C 3400-1.78-U

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

Footwear
(Men's, Women's, Boys' and Girls')

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst
Kenneth Greenman, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

TABLE OF CONTENTS

Page

MARKET TRENDS 1
  U.S. MANUFACTURING INDUSTRY BY TYPE OF FOOTWEAR 2
  VALUE OF INDUSTRY SHIPMENTS 5
  EMPLOYMENT & EARNINGS 6
  INDUSTRY CONCENTRATION 7
  LOCATION OF THE INDUSTRY 9
MANUFACTURERS' OPERATING RATIOS/ADVERTISING EXPENDITURES 10
PRODUCTION 12
  MATERIALS 17
PRODUCT SHIPMENTS (QUANTITY & VALUE) 19
  ATHLETIC FOOTWEAR 21
  SHIPMENTS BY CLASS OF CUSTOMER 22
PRODUCER (FACTORY) PRICES 22
FOREIGN TRADE 23
  IMPORTS 25
  EXPORTS 28
MARKET SUPPLY 29
RETAIL TRADE 29
  CONSUMER EXPENDITURES 30
  SIZE OF THE CONSUMER MARKET 31
  CONSUMER PRICES 33
  LEADING MARKETS 33

RETAIL TRADE

  RETAIL SALES BY TYPE OF OUTLET 34
    SHOE STORES 36
    DEPARTMENT STORES 38
    APPAREL SPECIALTY STORES 39
ATHLETIC FOOTWEAR MARKET 41
  BUYING HABITS 43
    SHOE SIZES (ADULT) 45
    TEENAGE GIRLS 46

Fairchild Fact Files, prepared by the Fairchid Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add up to the totals shown because of rounding.

E. B. Gold
Fairchild Book Division

Copyright © 1985 by Fairchild Publications

Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-524-0

Printed in the United States of America

FOOTWEAR (MEN'S, WOMEN'S, BOYS' & GIRLS')

Market Trends

At mid-year 1985, domestic footwear manufacturers are mounting to what appears to be a last-ditch effort to get legislation through Congress (and passed by the White House) to stem the tide of footwear imports, which now account for over 70% of total U.S. footwear consumption. The current strategy involves joining forces with the domestic textile/apparel coalition, which now accounts for over 70% of total U.S. footwear consumption. The current strategy involves joining forces with the domestic textile/apparel coalition, which is also seeking new import restraint legislation. Meetings of interested parties to achieve this end are now underway. Other segments of the industry, including manufacturers with substantial production overseas, importers and large retailers, are continuing their efforts against controls.

The Department of Commerce has projected domestic footwear industry shipments in 1985 at 279 million pairs, about 3% less than 1984. This marks the eighth straight year in which footwear shipments have declined. The long-term outlook at the manufacturer level remains poor. A compound annual rate of decline of about 3% is projected up to 1989. Without drastic changes in the industry's cost-competitiveness, or controls, the import share will exceed 80% by 1986.

Based on data available for shoe stores, footwear business has been doing quite well so far this year. In the first six months, total shoe store sales were up 6.8%, compared with the same 1984 period. On a seasonally adjusted basis, shoe store sales advanced 4.9% from July 1984; but appeared to fall 2.4% below the June figures, according to preliminary data from the Department of Commerce.

Consumer interest in the athletic footwear area continues to focus to a greater extent on casual, leisure styles rather than specialized athletic footwear for active use. However, aerobic footwear and basketball shoes are expected to continue to gain in consumer demand. An oversupply of some shoe types is reported, as importers stock up in anticipation of quota restrictions.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

The U.S. Bureau of the Census compiles a complete census of U.S. manufactures every five years, and reports covering the 1982 census are now being released. Selected findings from available reports are included in this fact file. Between censuses, the Bureau compiles annual surveys among a representative sample of manufacturers to help provide a continuous series of key industry statistics. Results in the 1983 annual survey should be available from the census bureau later this year.

In addition, the International Trade Administration, (Department of Commerce), publishes an annual edition of the U.S. Industrial Outlook. This includes estimates on footwear industry trends, updating Census Bureau data. Information from this source will be found following the next table based on Census Bureau reports.

GENERAL INDUSTRY STATISTICS

The U.S. Manufacturing Industry By Type of Footwear, 1977, 1982

	1982	1977	% Change 1982/1977
NONRUBBER FOOTWEAR, TOTAL (SIC 314)			
Number of companies	na	541	--
Number of establishments#	752	811	- 7.3%
With 20 or more employees	537	603	- 10.9
All employees (thous.)	122.5	145.5	- 15.8
Production workers (thous.)	108.4	129.3	- 16.2
Payroll (mil. $)	$1,255.1	$1,031.5	+ 21.7
Value added by manufacture (mil. $)**	na	2,069.4	--
Value of industry shipments (mil. $)***	5,285.1	3,891.7	+ 35.8
Capital expenditures, new (mil. $)	63.6	37.1	+ 71.4
MEN'S FOOTWEAR, EXCEPT ATHLETIC (SIC 3143*)			
Number of companies	129	115	+ 12.2
Number of establishments#	203	213	- 4.7
With 20 or more employees	159	180	- 11.7
All employees (thous.)	46.5	55.0	- 15.5
Production workers (thous.)	40.7	49.2	- 17.3
Payroll (mil. $)	503.1	$ 417.0	+ 20.6
Value added by manufacture (mil. $)**	1,101.1	871.9	+ 26.3
Value of industry shipments (mil. $)***	2,261.4	1,734.5	+ 30.4
Capital expenditures, new (mil. $)	28.3	14.5	+ 95.2
WOMEN'S FOOTWEAR, EXCEPT ATHLETIC (SIC 3144*)			
Number of companies	209	243	- 14.0
Number of establishments#	293	328	- 10.7
With 20 or more employees	226	241	- 6.2
All employees (thous.)	48.4	57.6	- 16.0
Production workers (thous.)	43.4	51.3	- 15.4
Payroll (mil. $)	483.1	$ 388.6	+ 24.3
Value added by manufacture (mil. $)**	1,107.0	755.0	+ 46.6
Value of industry shipments (mil. $)***	1,933.2	1,361.2	+ 42.0
Capital expenditures, new (mil. $)	20.2	9.7	+108.2
HOUSE SLIPPERS (SIC 3142*)			
Number of companies	53	65	- 18.5
Number of establishments#	62	78	- 20.5
With 20 or more employees	44	55	- 20.0
All employees (thous.)	7.5	8.1	- 7.4
Production workers (thous.)	6.4	7.0	- 8.6
Payroll (mil. $)	71.3	$ 54.5	+ 30.8
Value added by manufacture (mil. $)**	149.7	108.8	+ 37.6
Value of industry shipments (mil. $)***	275.8	201.2	+ 37.1
Capital expenditures, new (mil. $)	3.1	2.3	+ 34.8

(continued)

The U.S. Manufacturing Industry By Type of Footwear, 1977, 1982
(continued)

	1982	1977	% Change 1982/1977
FOOTWEAR, EXCEPT RUBBER, NOT ELSEWHERE CLASSIFIED (SIC 3149*)			
Number of companies	166	159	+ 4.4%
Number of establishments#	193	192	+ 0.5
With 20 or more employees	107	127	- 15.7
All employees (thous.)	19.1	24.8	- 23.0
Production workers (thous.)	16.8	21.8	- 22.9
Payroll (mil. $)	$ 192.7	$ 171.4	+ 12.4
Value added by manufacture (mil. $)**	450.9	333.7	+ 35.1
Value of industry shipments (mil. $)***	798.9	594.8	+ 34.3
Capital expenditures, new (mil. $)	14.0	10.6	+ 32.1
RUBBER & PLASTICS FOOTWEAR (SIC 3021*)			
Number of companies	53	67	- 20.9
Number of establishments#	65	84	- 22.6
With 20 or more employees	40	50	- 20.0
All employees (thous.)	17.6	19.8	- 11.1
Production workers (thous.)	15.0	16.4	- 8.5
Payroll (mil. $)	$ 196.5	$ 159.1	+ 23.5
Value added by manufacture (mil. $)**	360.1	272.3	+ 32.2
Value of industry shipments (mil. $)***	706.2	517.0	+ 36.6
Capital expenditures, new (mil. $)	12.4	11.3	+ 9.7
BOOT & SHOE CUT STOCK & FINDINGS (SIC 3131*)			
Number of companies	149	174	- 14.4
Number of establishments#	161	190	- 15.3
With 20 or more employees	80	96	- 16.7
All employees (thous.)	6.8	8.5	- 20.0
Production workers (thous.)	5.7	7.4	- 23.0
Payroll (mil. $)	$ 80.8	$ 65.3	+ 23.7
Value added by manufacture (mil. $)**	154.7	109.4	+ 41.4
Value of industry shipments (mil. $)***	367.8	270.6	+ 35.9
Capital expenditures, new (mil. $)	6.0	3.0	+100.0

na not available

# Each business location is counted as a separate establishment.

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) System determined by the principal product manufactured, as shown below. (SIC 314 is a composite of industries in 3142, 3143, 3144).

SIC 3143 comprises establishments primarily engaged in the production of men's dress and casual shoes, boots and work shoes. Footwear produced in this industry is primarily of leather.

SIC 3144 comprises establishments primarily engaged in the production of women's dress and casual shoes, sandals and boots. Footwear produced in this industry is primarily of leather.

GENERAL INDUSTRY STATISTICS

(Footnotes continued)

SIC 3142 comprises establishments primarily engaged in the production of house slippers made of leather or other materials. Slipper socks are included in this industry.

SIC 3149 comprises establishments primarily producing footwear not classified in the above industries or in SIC 3021 (rubber and plastic). Included in SIC 3149 are shoes for infants and babies, children, misses, youths and boys. Also included are all athletic shoes, theatrical shoes, and beach slippers.

SIC 3021 comprises establishments primarily engaged in manufacturing all-rubber and plastic footwear, waterproof fabric-upper footwear having rubber or plastic soles vulcanized to the uppers. There are two segments in this industry, (1) protective fabric upper footwear, such as athletic footwear, sneakers, sport oxfords and specialties designed for leisure wear.

SIC 3131 comprises establishments primarily engaged in manufacturing leather soles, inner soles, and other boot and shoe cut stock findings. This industry also includes finished wood heels. It does not include manufacturers of shoe findings made of rubber, plastic, or fiber.

** Value added by manufacture is derived by subtracting the cost of finished products, materials, supplies, fuel, contract work, etc., from the value of shipments (including resales of finished products) plus the net change in the value of finished products and work-in-process inventories between the beginning and end of the year, without adjustment for price changes.

*** Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products, as well as miscellaneous receipts for contract work, resales, etc. Industry shipments should be clearly distinguished from the total value of footwear made by all producers (product shipments) which includes footwear made as a secondary product by manufacturers classified in other industries. Total product value is shown in the section on PRODUCT SHIPMENTS.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977, 1982,
(Industry Series MC82-1-30A, 31A).

Explanation of other terms used in this fact file:

Nonrubber footwear: Includes shoes, boots and slippers made by "conventional" processes, such as cemented, welted, slip-lasted, etc., and shoes with rubber sole vulcanized to leather uppers. (Footwear covered in SIC 314).

Rubber/plastic footwear: Footwear with rubber or plastic soles/fabric uppers and rubber or plastic protective footwear. (SIC 302).

GENERAL INDUSTRY STATISTICS

The U.S. footwear industry is composed primarily of privately owned companies. In 1982, two out of three producers made less than one million pairs annually and accounted for only about 15% of total production. Twenty-one producers, each with annual production in excess of four million pairs, accounted for 53% of the industry output. However, these large producers as a group have not increased their market share since 1980, and have responded to declining demand by closing plants and consolidating operations. The largest nonrubber footwear producer in 1983 captured only 7.5% of total domestic production.

According to the International Trade Commission (1985 U.S. Industrial Outlook), there were about 250 U.S. companies with 10 or more employees producing nonrubber footwear in 1983. The number of factories showed a net decline of 24 in 1983, to 547. Then in 1984 another 95 plants were closed, bringing the total at the end of the year to 452.

The number of plants producing rubber and plastic footwear (SIC 3021) was reported by the ITT at 65 (the same as in the 1983 Census of Manufactures).

Value of Industry Shipments, 1983-1985
(Millions of dollars)

				Percent Change		
	1983(e)	1984(e)	1985(p)	1983/82	1984/83	1985/84
Nonrubber footwear						
Industry shipments (current $)						
Total	5,250	4,643	--	- 0.5	- 11.6	--
Slippers	250	220	--	- 9.4	- 12.0	--
Men's footwear	2,306	2,154	--	+ 2.1	- 6.6	--
Women's footwear	1,908	1,557	--	- 1.6	- 18.4	--
Footwear n.e.c.	786	712	--	- 2.1	- 9.4	--
Industry shipments (1972 $)						
Total	2,532	2,178	2,112	- 2.3	- 14.0	- 3.0
Slippers	128	111	111	-10.5	- 13.3	--
Men's footwear	986	904	879	+ 1.3	- 8.3	- 2.8
Women's footwear	979	778	748	- 4.5	- 20.5	- 3.9
Footwear n.e.c.	439	385	374	- 2.7	- 12.3	- 2.9
Rubber/plastics footwear						
Industry shipments (current $)	708	705	--	+ 0.3	- 0.4	--
Industry shipments (1972 $)	419	415	410	+ 0.8	- 1.1	- 1.1

n.e.c. not elsewhere classified
(e) estimated
(p) projected

Source: International Trade Commission,
1985 U.S. Industrial Outlook.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Information on employment and earnings by industry in the U.S. is reported on a current basis by the Bureau of Labor Statistics, U.S. Department of Labor. The data differs somewhat from figures issued by the U.S. Census Bureau due to a difference in methodology followed in compiling the data.

BLS data confirms the steady decline in the U.S. footwear industry, which has accelerated in recent years. Preliminary reports for the month of May 1985 show total employment in the nonrubber footwear industry at 105,700 compared with 120,600 in the same month a year earlier, and 128,300 in May 1983.

In the men's nonrubber footwear segment, employment in May 1985 was down 12%; in women's, down 12.3% in May 1985, compared to a year earlier. Employment in the domestic rubber/plastics footwear industry, which had held up rather well in 1984, registered an 18.7% decline in May 1985, compared with May 1984, bringing the total to 14,300. This compared with the 1984 annual average of 16,500.

For the entire year 1984, nonrubber footwear industry employment averaged 7.9% below the 1983 average, with most of the decline occurring in the latter part of the year. In the fourth quarter of 1984, employment averaged about 12% below the level in the same 1983 period. Reversing the trend noted in recent years, the drop-off in employment in the nonrubber footwear industry last year was somewhat greater in the women's segment than in the men's at--(2.8% vs. -4.4%).

Labor costs have been cited as a prime factor in the inability of U.S. manufacturers of footwear to compete with imports. The large capital investment required to narrow the spread, especially in adopting robotics, etc., is beyond the reach of many small and medium-sized producers; meanwhile, hourly earnings have continued to rise.

In 1984, hourly earnings in the nonrubber footwear industry averaged $5.43--gaining 3.0% over the 1983 average of $5.27 and 6.1% higher than in 1982. In the men's footwear segment, hourly earnings averaged $5.71 last year, up 3.8% compared with 1983; in women's footwear, the 1984 average was $5.24, up 1.5%. In the rubber/plastics footwear industry, average hourly earnings were at $5.35 in 1984, up 3.7% over the 1983 average.

While average hourly earnings in the nonrubber footwear industry in 1984 were up 3% compared with 1983, average weekly hours dropped slightly (-0.3%), from 36.2 to 36.1. Productivity continued to decline. According to Footwear Industries of America, the industry association, nonrubber footwear production per production employee hour averaged 1.50 pairs in the last quarter of 1984, down from 1.80 pairs in the first quarter. In the first quarter of 1985, according to FIA, production per employee hour averaged 1.63 pairs, down 9.4% from the comparable 1984 period.

Employment & Earnings (continued)

Employment & Earnings in the U.S. Footwear Industry
Annual Averages, 1982-1984

	Employment (thousands)					
	All Employees			Production Workers		
	1984	1983(r)	1982(r)	1984	1983(r)	1982(r)
Nonrubber footwear, total*	116.1	126.0	135.1	98.8	107.3	115.1
Men's exc. athletic	47.9	50.7	54.8	38.8	41.0	45.3
Women's, exc. athletic	43.5	47.9	51.4	38.2	42.5	44.8
Rubber/plastics footwear	16.5	16.7	18.7	14.1	14.1	16.2

	Production Worker Hours & Earnings					
	Average Weekly Hours			Average Weekly Earnings ($)		
	1984	1983(r)	1982(r)	1984	1983(r)	1982(r)
Nonrubber footwear, total*	36.1	36.2	35.1	196.02	190.77	179.71
Men's, exc. athletic	36.5	36.8	35.3	208.42	202.40	188.86
Women's, exc. athletic	35.7	35.9	34.8	187.07	185.24	174.35

(r) revised

* The total includes footwear not separately listed, such as infants', children's, youths', and athletic footwear.

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

Industry Concentration

Reports are currently being issued by the U.S. Census Bureau based on the complete census of manufactures (which is compiled every five years) covering operations in the year 1982.

Information on establishments (plants) by employment size has been released, and is summarized below. Later this year, the Bureau will issue details on Concentration Ratios in Manufacturing, which will detail shipment and employment shares by company, etc.

While about 40% of the plants manufacturing footwear (including both nonrubber and rubber/plastic) have fewer than 50 employees, plants with 250 or more (26.6% of the total) accounted for about 69% of the total value of footwear shipments in 1982.

GENERAL INDUSTRY STATISTICS

Industry Concentration (continued)

Value Added By Manufacture & Value of Shipments By Employment Size of Footwear Manufacturing Plants, 1982

	Plants By Employment Size		Value Added By Manufacture		Value of Shipments	
	No.	%	Mil. $	%	Mil. $	%
Nonrubber footwear						
Men's (SIC 3143)	203	100.0	$1,101.1	100.0	$2,261.4	100.0
No. of employees:						
1 - 49	59	29.1	15.7	1.4	32.7	1.5
50 - 99	19	9.4	19.3	1.8	48.3	2.2
100 - 249	49	24.1	222.9	20.3	447.6	20.7
250 - 499	56	27.6	466.2	42.3	932.0	43.1
500 or more (over 2500)	20	9.8	376.9	34.2	700.8	32.4
Women's (SIC 3144)	293	100.0	1,107.0	100.0	1,933.2	100.0
No. of employees:						
1 - 49	99	33.8	31.3	2.8	55.3	2.9
50 - 99	44	15.0	62.0	5.6	119.6	6.2
100 - 249	65	22.2	251.1	22.7	453.9	23.5
250 - 499	77	26.3	617.7	55.8	1,064.5	55.0
500 - 999	8	2.7	145.0	13.1	239.9	12.4
House Slippers (SIC 3142)	62	100.0	149.7	100.0	275.8	100.0
No. of employees:						
1 - 49	32	51.6	9.3	6.2	14.9	5.4
50 - 99	8	12.9	12.8	8.6	23.0	8.3
100 - 249	11	17.7	33.5	22.4	73.9	26.8
250 - 499	8	12.9	61.6	41.1	104.2	37.8
500 - 999	3	4.8	32.5	21.7	59.7	21.7
Other nonrubber footwear (athletic, etc.) (SIC 3149)	193	100.0	450.9	100.0	798.9	100.0
No. of employees:						
1 - 49	111	57.5	31.3	6.9	52.9	6.6
50 - 99	20	10.4	27.3	6.1	43.5	5.4
100 - 249	36	18.6	128.2	28.4	242.2	30.3
250 - 499	22	11.4	224.5	49.8	379.2	47.5
500 or more (up to 2,499)	4	2.1	39.6	8.8	81.1	10.2
Rubber/plastics footwear (SIC 3021)	65	100.0	360.1	100.0	706.2	100.0
No. of employees:						
1 - 49	33	50.8	15.1	4.2	25.8	3.7
50 - 249	13	20.0	59.5	16.5	127.6	18.0
250 - 499	9	13.8	90.0	25.0	157.5	22.3
500 or more (up to 2,499)	10	15.4	195.5	54.3	395.3	56.0

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
(Industry Series MC82-1).

GENERAL INDUSTRY STATISTICS

Location of the Industry

Data on footwear manufacturing plants by leading States has been published by the Census Bureau in the Industry Series reports covering findings in the 1982 census of manufactures. Following is a summary for major segments of the industry--men's footwear except athletic (SIC 3143), and women's footwear, except athletic (SIC 3144).

Maine is the leading State in both segments, accounting for about 16% of the total value added by manufacture and of the total value of industry shipments. The second most important State in the manufacture of men's nonrubber footwear is Tennessee, which accounted for about 13% of the total value added by the manufacturing process (not including cost of materials, etc.) in 1982. Missouri was the second most important State in the manufacture of women's nonrubber footwear, not including athletic.

Men's & Women's Nonrubber Footwear Industry Statistics
for Leading States, 1982

	No. of Plants		Employees	Valued Added By Manufacturer		Value of Shipments	
	Total	With 20+ Employees	(thous.)	Mil. $	%	Mil. $	%
Nonrubber footwear							
Men's (SIC 3143)	203	159	46.5	$1,101.1	100.0	$2,261.4	100.0
Leading states:							
Maine	20	18	6.8	184.8	16.8	356.7	15.8
Massachusetts	20	13	3.4	72.5	6.6	138.8	6.1
North Carolina	9	9	3.3	74.3	6.7	155.2	6.9
Pennsylvania	16	15	3.9	82.0	7.4	167.3	7.4
Tennessee	17	17	5.7	142.5	12.9	255.8	11.3
Texas	24	14	4.3	63.4	5.8	209.0	9.2
Wisconsin	13	13	3.4	100.1	9.1	208.1	9.2
Women's (SIC 3144)	293	226	48.4	1,107.0	100.0	1,933.2	100.0
Leading states:							
California	38	26	3.7	70.4	6.4	138.5	7.2
Maine	27	23	6.8	181.0	16.3	305.5	15.8
Missouri	25	22	6.3	143.5	13.0	252.7	13.1
New Hampshire	23	20	5.1	92.0	8.3	170.6	8.8
New York	41	25	2.7	60.1	5.4	106.0	5.5
Pennsylvania	23	19	3.3	67.6	6.1	121.1	6.3
Tennessee	10	10	2.9	70.6	6.4	124.5	6.4

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
(Industry Series MC82-1).

It is reported that the American shoe industry has closed 500 factories since 1968--including 95 last year, alone.

MANUFACTURERS' OPERATING RATIOS/ADVERTISING EXPENDITURES

A composite report covering profit and loss data for 18 shoe manufacturers in fiscal periods has been compiled by Kurt Salmon Associates, management consultants, New York, N.Y. After registering a recovery in 1983 from the recession lowpoint reached in 1982, net income as a percent of net sales dropped to 3.2% in fiscal 1984. This compares with 4.8% in 1983 and 4.7% in 1982.

Profit & Loss Data, U.S. Shoe Manufacturers
Fiscal Period Ending 1980 - 1984

	1984	1983	1982	1981	1980
Reported net sales (18 manufacturers) (000)	$2,643.9	$2,510.1	$2,163.7	$1,733.8	$1,318.1
Percent	100.0%	100.0%	100.0%	100.0%	100.0%
Cost of goods sold	70.44	68.25	68.76	70.27	70.70
Gross profit	29.56	31.75	31.24	29.73	29.30
Income before tax	5.64	9.03	8.77	8.57	7.28
Income after tax	3.20	4.78	4.67	4.87	3.90
Net income (including extraordinary items)	3.21	4.80	4.67	4.87	3.91

Source: Kurt Salmon Associates Inc., The KSA Perspective, (June 1985).

Some manufacturers managed to do well in 1984--notably those making athletic products or sourcing overseas, with one exception among top performers on the basis of profits--Shaer Shoe, manufacturer of women's shoes. Conversely, the losers, with profit ratios below the group's composite results tended to be manufacturers of conventional and leisure footwear.

One of the fastest growing footwear firms is Reebok, U.S.A., Ltd., which specializes in footwear for aerobics and racket sports. (Like Nike, it is also diversifying into apparel). According to trade reports, Reebok's sales in the U.S. are likely to hit $200 million this year--up from only $3.5 million in 1982. The company has recently gone public. (Reebok footwear is sourced abroad, primarily in Asia).

Sales & Profits of Leading Publicly-Held Footwear Manufacturers

	Sales 1984	(Mil. $) 1983	% Change 1984/83	Net Profit % Change 1984/83	Net Profit % of Sales 1984	Net Profit % of Sales 1983
U.S. Shoe Corp.	$1,717.4	$1,507.8	+13.9%	- 29.0%	3.11%	4.99%
Nike, Inc.	919.8	867.2	+ 6.1	- 28.6	4.42	6.57
Genesco, Inc.	606.3	639.8	- 5.2	--	1.82	--
Wolverine World Wide	378.6	353.1	+ 7.2	- 95.0	0.28	6.00
Stride Rite Corp.	289.5	301.7	- 4.0	- 67.7	1.87	5.57
Converse, Inc.	265.6	209.5	+26.8	+ 30.2	5.45	5.30
R.G. Barry	120.2	102.7	+17.0	- 76.0	0.12	0.58
Weyenberg Manufacturing	108.4	103.6	+ 4.6	+ 10.3	3.97	3.76

(continued)

MANUFACTURERS' OPERATING RATIOS/ADVERTISING EXPENDITURES

Sales & Profits of Leading Publicly-Held Footwear Manufacturers
(continued)

	Sales 1984	(Mil. $) 1983	% Change 1984/83	Net Profit % Change 1984/83	Net Profit % of Sales 1984	Net Profit % of Sales 1983
Suave Shoe Corp.	96.4	$ 111.5	- 13.5%	*	--	1.82%
Craddock Terry	83.4	80.1	+ 4.1	*	--	3.01
Amfesco Industries, Inc.	81.9	74.5	+ 9.9	+ 12.5	12.92	12.62
Tony Lama Co., Inc.	78.9	79.0	- 0.1	- 29.5	3.59	5.09
The Cherokee Group	72.4	48.3	+ 49.9	+ 82.5	4.22	3.47
Hyde Athletic Industries	47.3	44.6	+ 6.2	- 6.4	5.67	6.43
B.B. Walker Co.	42.6	39.7	+ 7.3	**	0.41	--
Shaer Shoe Corp.	28.0	23.4	+ 19.4	+110.5	8.46	4.80
Daniel Green Co.	25.6	26.1	- 2.0	- 0.3	8.16	8.02
Penobscot Co.	12.6	18.2	- 30.7	+146.9	2.88	0.81
Wellco Enterprises, Inc.	10.2	9.1	+ 12.0	***	--	--
Composite Results	4,985.1	4,639.9	+ 7.4	- 27.4	3.01	4.46

* Loss in 1984. ** Loss in 1983. *** Loss in both 1983 and 1984.

Source: Footwear News, July 8, 1985.

In addition to the above resources, large footwear retailing companies are diversifying their operations, getting into manufacturing operations to supply their own retail outlets. These vertical companies include Melville, Wiener Enterprises, Brown Group and U.S. Shoe.

Advertising Expenditures

Management consultants Schonfeld & Associates, Evanston, Illinois, compile an annual study of advertising expenditures based on an analysis of companies' 10-K Reports. These are filed by publicly-owned companies with the Securities & Exchange Commission. Total spending for advertising by footwear suppliers--including both media and non-media spending, production, etc.--included in the detailed report issued by Schoenfeld for 1984--was summarized in the July 15, 1985 issue of Advertising Age, as noted below.

It should be noted that the percents are based on a composite of all reports, including companies which advertise and those who do not.

Nonrubber Footwear Industry Advertising Expenditures, 1981-1984

Year	Advertising Expenditures % of Sales	Advertising Expenditures % of Margin	Annual Growth Rate %
1984	3.8%	10.4%	7.8%
1983	3.0	8.5	6.5
1982	3.0	7.9	5.9
1981	3.0	8.2	nr

nr not reported.

Source: Schoenfeld & Associates, Advertising Age (July 15, 1985).

PRODUCTION

Capacity utilization in the U.S. footwear industry underwent a sharp drop starting in 1982 due to a flood of imports. And it has continued to decline, although there has been some levelling off somewhat in the past two years. Footwear Industries of America reports capacity utilization at 70.1% in 1984, compared with an overall average of 70.3% in 1983. In 1982, the average was 73.1%; in 1981, 79.1%; in 1980, 78%.

The lowest rate last year was in athletic footwear (56.9%). Women's footwear plants had the best rate (75.5% on average), followed by children's footwear, at 71% and men's at 70.8%.

Nonrubber Footwear

In the first six months of 1985, preliminary figures on U.S. nonrubber footwear production compiled by the Census Bureau showed a decline of 18.9% in pairage compared with the same 1984 period. Production of men's footwear was down 16.7%; women's, down 20.7%, and juvenile footwear, down 21.8%. Production of footwear classified as athletic registered a whopping drop of 46.1%.

Revised 1984 production figures for nonrubber footwear totaled 301.4 million pairs, an 11.1% decrease from 1983 production figures of 339.2 million pairs. Of the total 1984 production, 72.1 million pairs were men's, 6.5 million pairs were youths' and boys', 114.6 million were women's, 5.4 million were misses', and 10.2 million were children's shoes. Athletic footwear accounted for almost 14 million pairs in 1984 (down 24% compared with 1983).

In the nonrubber footwear category, 1984 production of men's shoes and boots, not including athletic footwear, registered a 4.7% decline compared with the 1983 total. This category was sustained by an output of men's boots (up 4.2%) and work shoes/boots (up 9.5%), as production of men's dress and casual shoes in 1984 declined 12.4%.

Production of women's shoes and boots, except athletic, registered an overall decline of 14.3% in 1984 compared with 1983. The sharpest dip occurred in sandals (-26.2%), a classification under particularly sharp competition from imports. Shoes and boots for misses were the only major classification to register a gain (up 49%) in 1984 compared with 1983, but output remained 36% below the total reported for 1982. Domestic production of nonrubber footwear peaked at 642 million pairs in 1966 and has been declining since that year.

Percentage Distribution of U.S. Production of Nonrubber Shoes & Boots By Categories, 1982-1984

	1984	1983	1982
Total nonrubber shoes & boots	100.0%	100.0%	100.0%
Men's, youths', boys', excl. athletic	31.7	30.0	29.2
Women's, misses', excl. athletic	48.5	50.2	49.5
Children's, infants', excl. athletic	12.1	11.4	12.7
Athletic	5.7	6.5	6.5
All other non rubber, excl. slippers	2.0	1.9	2.1

Source: International Trade Commission based on U.S. Bureau of Census statistics.

PRODUCTION

Rubber/Plastics Footwear

The rubber/plastics footwear industry is composed of two distinct product classes: (1) rubber and plastics protective footwear (hunting boots, galoshes, rubbers, industrial productive footwear, etc.) and (2) rubber or plastic-soled footwear with fabric upper (tennis shoes, sneakers, nonleather athletic footwear and such specialties as espadrilles and other leisure shoes).

Preliminary figures from the Census Bureau for the first six months of 1985 show production of the sneaker-type rubber/plastic footwear to be down 8.1%, while protective footwear gained 15.3% compared with the same 1984 period.

This follows a sharp decline in the tennis shoe/sneaker type of footwear in 1984. Production was off over 17% following a 16% decline in 1983 compared with 1982.

Rubber/plastic protective footwear output, however, gained 14.7% in 1984 over 1983.

Total Footwear

U.S. Production of Footwear By Type, 1982-1984
(Thousands of pairs)

				% Change	
	1984	1983(r)	1982(r)	1984/83	1983/82
Footwear, total (nonrubber & rubber/plastic excl. protective footwear)	365,914	417,236	452,003	- 12.3%	- 7.7%
Shoes & slippers, nonrubber, total	301,398	339,182	359,107	- 11.1	- 5.5
Shoes, athletic footwear, boots	247,372	281,490	305,066	- 12.1	- 7.7
Men's, except athletic	72,048	75,617	79,727	- 4.7	- 5.2
Dress & casual	41,475	47,352	43,874	- 12.4	- 7.9
Boots, dress & casual	11,066	10,619	14,496	+ 4.2	-26.7
Western style boots	7,468	7,220	11,199	+ 3.4	-35.5
Work shoes (ankle height or higher	19,316*	17,646	21,357	+ 9.5	-17.4
Steel toes	5,473	5,642	7,068	- 3.0	-20.2
Type not specified	191	--	--	--	--
Youths' & boys' (except athletic)	6,522	8,983	9,388	- 27.4	- 4.3
Boots	173	441	1,024	- 60.8	-56.9
Women's, except athletic	114,584	133,684	142,516	- 14.3	- 6.2
Sandals	13,433	18,198	19,775	- 26.2	- 8.0
Dress & casual (except sandals)	93,212	106,773	115,934	- 12.7	- 7.9
Uniform duty shoes	51	nr	nr	--	--
Boots, ankle height or higher	7,888	8,713	6,807	- 9.5	+28.0
Western style boots	575	nr	nr	--	--

(continued)

PRODUCTION

Total Footwear (continued)

U.S. Production of Footwear By Type, 1982-1984
(Thousands of pairs)
(continued)

	1984	1983(r)	1982(r)	% Change 1984/83	% Change 1983/82
Footwear nonrubber (continued)					
Misses' (except athletic)	5,444	3,653	8,536	+49.0%	-57.2%
Boots	91	nr	nr	--	--
Children's shoes (except athletic)	10,223	10,518	13,202		
Boots	629	917	1,752	-31.4	-47.7
Infants' & babies'	19,653	21,451	25,435	- 8.4	-15.7
Athletic shoes	13,980	18,397**	19,866	-24.0	- 7.4
By type:					
Court shoes	1,762	nr	nr	--	--
Running or jogging shoes	3,884	nr	nr	--	--
Cleated, except golf shoes	125	nr	nr	--	--
All other	8,209	nr	nr	--	--
All other shoes in the nonrubber footwear classification (ballet, etc.)	4,918	5,254	6,396	- 6.4	-17.8
Slippers	54,026	57,692	54,041	- 6.4	+ 6.8
Men's, youths', boys'	9,286	9,309	9,107	- 0.2	+ 2.2
Women's, misses'	39,183	42,222	39,430	- 7.2	+ 7.1
Children's, infants,, babies'	5,557	6,161	5,504	- 9.8	+11.9
Shoes with rubber or plastic soles/fabric uppers, total	64,516	78,054	92,896	-17.3	-15.8
Fabric upper espadrilles	1,263	1,287	1,963	- 1.9	-14.4
Fabric upper cement process	3,984	7,066	6,698	-43.6	+ 5.5
All other fabric upper shoes	59,269	69,701	84,235	-15.0	-17.2

* See following table on work shoes.
** See following table on athletic shoes.
(r) revised
nr not reported

Source: U.S. Bureau of the Census, Current Industrial Reports, Footwear (MA-31).

Special Types

For the year 1984 the Census Bureau reported the following data on work shoes and boots not covered in earlier reports:

Production of Work Shoes & Boots for Men, 1984
(Thousands of pairs)

Work oxfords	3,219
Steel toes	881
Work boots	16,097
Steel toes	4,592

Special Types (continued)

Census Bureau data for 1983 and 1982 included the following breakdowns on athletic footwear not reported in 1984:

Production of Athletic Footwear, 1982, 1983
(Thousands of pairs)

	1983	1982
Athletic shoes	18,307	19,866
Designed for sports	6,703	7,413
All other (joggers, etc.)	11,604	12,453
Up to size 3	972	1,411
Size 3 and over	10,632	11,042

Source: U.S. Bureau of the Census, *Current Industrial Reports*.

U.S. Production of Rubber & Plastic Protective Footwear, 1982-1984
(Thousands of pairs)

				% Change	
	1984	1983(r)	1982(r)	1984/83	1983/82
Total	17,734	15,459	13,920	+ 14.7%	+ 11.1%
Rubber upper protective footwear	9,331	8,242	6,721	+ 13.2	+ 22.6
Boots	3,560	3,541	2,072	+ 1.3	+ 69.6
Lumberman & pacs	nr	nr	nr	--	--
Arctics & gaiters	2,379	1,884	1,744	+ 26.3	+ 8.0
Light & heavy rubbers	nr	nr	nr	--	--
Plastic upper protective footwear	5,138	4,916	5,822	+ 4.5	- 15.6
Fabric upper protective footwear	3,265	2,301	1,377	+ 41.9	+ 67.1

(r) revised
nr not reported

Source: U.S. Bureau of the Census, *Current Industrial Reports, Footwear* (MA-31).

Seasonal Pattern in Production

Percent of Year's Total Production by U.S. Manufacturers, by Months, 1984
(Based on quantity)

	Nonrubber Footwear Total*	Men's	Women's	Juvenile	Athletic	Slippers
Total, year 1983	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	9.0	8.4	9.7	9.2	9.7	8.6
February	9.6	8.6	10.0	10.9	8.6	9.5
March	10.0	10.0	9.8	10.2	11.4	9.7
April	9.1	9.6	9.2	8.9	8.8	8.6
May	9.4	9.5	9.4	9.8	8.8	9.2
June	8.1	8.3	7.9	8.4	6.2	8.4
July	6.8	6.5	7.7	7.8	4.9	5.3
August	8.6	8.7	8.2	6.7	10.6	10.2
September	7.2	7.2	7.0	6.4	8.2	8.0
October	8.3	9.0	7.6	7.5	7.8	9.4
November	7.4	7.4	7.1	7.5	7.0	7.7
December	6.4	6.8	6.4	6.7	8.0	5.6

* Includes other nonrubber footwear not separately reported.

Source: Based on U.S. Bureau of the Census, Current Industrial Reports.

By Geographic Region of the U.S.

The 12.3% decline in U.S. production of nonrubber footwear in 1984 compared with 1983 was shared (though not equally) by producers throughout the U.S. Factories in the Middle Atlantic region were able to do better than the overall average, thus upping their shares of total production.

New England's share of nonrubber footwear production went from 22.2% in 1983 to 21.0% in 1984. The Middle Atlantic region's share increased from 21.9% to 23.5%.

PRODUCTION

By Geographic Region of the U.S. (continued)

Production of Nonrubber Footwear by Geographic Region & By Leading States, 1983, 1984

	Thousand Pairs		Percent Distribution	
	1984	1983	1984	1983
U.S. total	301,398	339,182	100.0%	100.0%
New England division	63,229	75,166	21.0	22.2
Maine	34,799	42,836	11.5	12.6
New Hampshire	11,502	15,045	3.8	4.4
Other States	16,928	17,285	5.6	5.1
Middle Atlantic division	70,960	74,360	23.5	21.9
New Jersey	nr	nr	--	--
New York	nr	nr	--	--
Pennsylvania	39,696	37,484	13.2	11.1
North Central region	72,078	82,744	23.9	24.4
Ohio	nr	nr	--	--
Illinois	5,885	7,301	1.9	2.2
Wisconsin	7,236	7,321	2.4	2.1
Missouri	34,493	35,172	11.4	10.4
South & West regions	95,131	106,912	31.6	31.5
Virginia	nr	nr	--	--
North Carolina	5,911	7,328	2.0	2.2
Tennessee	18,872	20,138	6.3	5.9
Maryland	nr	nr	--	--
Georgia	3,680	5,010	1.2	1.5
Florida	nr	nr	--	--
Kentucky	2,846	3,826	0.9	1.1
Arkansas	11,927	12,969	3.9	3.8
Texas	12,817	12,922	4.2	3.8
California	7,032	10,430	2.3	3.1
Hawaii	nr	nr	--	--
Other States	14,101	14,717	4.7	4.3

nr not reported. (Data withheld to avoid disclosing figures for individual companies).

Source: U.S. Bureau of the Census,
Current Industrial Reports, MA31A(84).

Materials

The footwear industry consumed about 62% of all leather produced domestically in 1984. The production of footwear made with leather uppers held at about 55%, although overall footwear production has declined, as previously noted.

Materials (continued)

Consumption of sole leather in 1984 remained relatively unchanged from 1983. The high proportion of cattlehides exported in recent years have been a major cause of high domestic raw material and leather prices. Developing countries--particularly raw-material producers, such as Argentina, Brazil and India--have used embargoes and taxes to restrict their exports and encourage their own tanning and leather products industries. Due to such restrictive measures, world demand has been concentrated in the U.S., driving up prices. For January-August 1984, the Commerce Department composite monthly price of cattlehides averaged 64.1 cents per pound, up 29% from an average of 49.4 cents per pound in the same 1983 period. In August 1984 the price reached 68.2 cents per pound and appeared to be on its way to reaching once again the historic high of 75 cents recorded in 1979. However, prices softened somewhat in 1985. As of July, the Department of Labor reported the producer price index covering leather was 9.3% below the index in July 1984.

Preliminary information on nonrubber footwear production in the U.S. in 1983 indicates that, overall, 55% of the pairs produced had leather uppers, up from 53.2% in 1982, and 53.0% in 1981.

Production of Nonrubber Footwear by Material in Uppers, 1982-1984
(Shoes, Boots & Slippers)

	1984		1983(r)		1982(r)	
	Mil. Pairs	%	Mil. Pairs	%	Mil. Pairs	%
Total Production	301.4	100.0	334.2	100.0	359.1	100.0
Type of upper:						
Leather	165.2	54.8	187.1	55.2	196.3	54.7
Plastic (vinyl)	72.0	23.9	74.6	22.0	87.3	24.3
Other	64.2	21.3	77.5	22.8	75.5	21.0

(r) = revised

Source: Based on U.S. Bureau of the Census reports.

While production by U.S. manufacturers has been on the decline, the share of U.S. shoe output accounted for by those with leather uppers has held at 65%. Men's shoes have the highest percentage of leather uppers (over 92% in 1984). Not including rubber/plastic-soled athletic footwear, athletic shoe types made in the nonrubber footwear classification registered a gain in 1984, reversing the sharp decline in recent years.

Share of U.S. Production of Selected Types of Nonrubber Shoes & Boots Which Have Leather Uppers

	Percent of Total				
	1984	1983	1982(r)	1981	1980
Leather uppers in shoes & boots, total*	65.5%	65.3%	63.1%	63.7%	63.5%
Men's shoes & boots, except athletic	92.2	90.2	89.9	87.9	86.7
Women's shoes & boots, except athletic	54.1	56.7	54.6	54.2	54.8
Athletic footwear	53.6	46.4	43.4	51.5	68.6

* Includes shoe types not separately listed.
(r) = revised.

Source: Based on U.S. Bureau of the Census, Current Industrial Reports.

PRODUCTION

Materials (continued)

Allowing for imports, the total supply of footwear available to consumers shows a different picture in regard to types of upper material. Leather's share is sharply reduced.

Data on the overall supply--or U.S. apparent consumption of footwear--by type of material indicates a definite trend to footwear which is primarily leather. Including U.S. production plus imports for consumption less U.S. exports, leather footwear in 1984 represented 43% of the total supply, up from 40.5% in 1983 and 39% in 1982.

Total U.S. Apparent Consumption of Footwear
By Major Material Type, 1982-1984
(Pairs are in millions)

	1984		1983		1982	
	Pairs	%	Pairs	%	Pairs	%
Total footwear	1,222.8	100.0	1,119.9	100.0	1,045.0	100.0
Shoes & slippers (nonrubber)	1,018.3	83.3	911.9	81.4	829.8	79.4
Leather footwear	525.6	43.0	453.4	40.5	407.2	39.0
Plastic footwear	327.5	26.8	259.7	23.2	260.8	25.0
All other	165.1	13.5	198.7	17.7	161.7	15.5
Footwear with rubber or plastic soles, fabric uppers	171.1	14.0	179.5	16.0	190.6	18.2
Rubber & plastic protective footwear	33.4	2.7	28.5	2.5	24.6	2.4

Source: U.S. Bureau of the Census, Current Industrial Reports.

PRODUCT SHIPMENTS

Monthly estimates on production and shipments of footwear by U.S. manufacturers based on mail surveys are compiled by the U.S. Census Bureau in the Current Industrial Reports series. Annual estimates on a broader base are compiled by the Bureau in the annual surveys of manufactures (of which the most recent report covers 1981), and in the complete census of manufactures compiled every five years.

In the first six months of 1985, according to CIR data, nonrubber footwear shipped by U.S. plants declined 19.1% in quantity and 20.1% in value, compared with the same 1984 period. In the same months of 1985, there was an increase of 7.2% in the quantity of rubber/plastic footwear of the sneaker type shipped by U.S. plants, but the value of these shipments was off 7.2% from the total in the first half of 1984. Shipments of rubber/plastic protective footwear were down 1.9% in terms of pairs, but value was up 10.3%.

The International Trade Administration, U.S. Department of Commerce, has issued the following estimates on total footwear, shipments by all producers in the U.S. in terms of value on a constant (1972) dollar, with projections for 1985.

PRODUCT SHIPMENTS

Value of Footwear Shipments By All U.S. Producers, 1982-1985
(Millions of 1972 dollars)

	1982	1983	1984	1985(p)	Percent Change 1983/82	1984/83	1985/84
Nonrubber footwear							
Total value	2,592	2,532	2,178	2,112	- 2.3%	-14.0%	- 3.0%
Men's (exc. athletic)	973	986	904	879	+ 1.3	- 8.3	- 2.8
Women's (exc. athletic)	1,025	979	778	748	- 4.5	-20.5	- 3.9
Slippers	143	128	111	111	-10.5	-13.3	--
Footwear, n.e.c.	451	439	385	374	- 2.7	-12.3	- 2.9
Rubber/plastics footwear							
Total value	388	285	382	375	- 0.7	- 0.6	- 1.9

n.e.c. not elsewhere classified.
(p) projected.

Source: U.S. Department of Commerce,
International Trade Administration,
1985 U.S. Industrial Outlook.

Quantity & Value of Shipments of Footwear By All Producers, 1983, 1984
By Type of Footwear

	Pairs (thous.) 1984	1983	Value (mil. $) 1984	1983	% Change 1984/83 Pairs	Value
Footwear, incl. rubber/plastic as well as nonrubber, total	--	--	$4,934.2	$5,299.9	--	- 6.9%
Nonrubber footwear, total	307,201	343,082	4,532.0	4,814.7	- 10.5%	- 5.9
Shoes & boots (excl. slippers)	252,387	283,483	4,334.7	4,607.8	- 11.0	- 5.9
Men's, except athletic	72,488	78,385	1,969.7	1,988.2	- 7.5	- 0.9
Dress & casual	41,775	47,474	959.4	1,013.8	- 12.0	- 5.4
Boots (dress & casual, including Western)	10,223	10,286	448.7	431.9	- 0.6	+ 3.9
Workshoes & boots	20,490	20,625	561.5	542.5	- 0.6	+ 3.5
Youths' & boys', except athletic	6,015	8,851	64.2	88.2	- 32.0	- 27.3
Women's, except athletic	116,967	132,985	1,738.6	1,918.1	- 12.0	- 9.4
Sandals	15,372	18,084	154.4	227.5	- 15.0	- 32.1
Dress & casual, except sandals	94,201	105,662	1,411.7	1,450.3	- 10.8	- 2.7
Boots, ankle height or higher	7,394	9,239	172.6	240.3	- 20.0	- 23.2
Misses', except athletic	4,905	6,917	61.7	85.3	- 29.1	- 27.7
Children's, except athletic	10,744	10,915	117.8	121.0	- 1.6	- 2.6
Infants' & babies'	21,684	22,222	139.9	133.9	- 2.4	+ 4.6
Athletic	14,120	17,265	206.2	233.9	- 18.2	- 11.9
All other nonrubber shoes	5,464	5,943	36.6	39.0	- 8.1	- 6.1
Slippers	54,814	59,599	197.3	207.2	- 8.0	- 4.7
Men's, youths', boys'	9,495	10,029	41.9	42.4	- 5.3	- 5.9
Women's & misses'	39,371	43,076	142.6	151.5	- 8.6	- 5.9
Children's, infants', babies'	5,948	6,494	12.8	13.2	- 8.4	- 2.8

(continued)

PRODUCT SHIPMENTS

Quantity & Value of Shipments of Footwear By All Producers, 1983, 1984
By Type of Footwear
(continued)

	Pairs (thous.)		Value (mil. $)		% Change 1984/83	
	1984	1983	1984	1983	Pairs	Value
Rubber/plastic footwear						
Rubber/plastic soles/fabric uppers, total	65,300	78,560	$ 402.2	$ 485.2	- 16.9%	- 17.1%
Espadrilles	1,289	1,262	11.3	9.3	+ 2.1	+ 21.6
Protective footwear						
Rubber upper	8,732	7,007	95.2	83.1	+ 24.6	+ 14.6
Plastic upper	5,152	4,369	28.9	30.6	+ 17.9	- 5.6
Fabric upper	3,232	2,118	34.3	20.5	+ 52.6	+ 66.9

Source: U.S. Bureau of the Census,
Current Industrial Reports (MA31A).

Athletic Footwear

The U.S. athletic footwear industry faced severe problems in 1983/84, involving inroads from imports, fast-changes in style preferences on the part of consumers, and oversupply at the retail level. In terms of pairs, U.S. shipments were down 18.2%; in value, down 11.9% in 1984 compared with 1983. Athletic footwear accounted for 4.6% of U.S. producers' shipments of nonrubber footwear last year, down from 5.0% in 1983 and 1982. Imports of nonrubber athletic footwear, on the other hand, rose 40.4% in pairage and 42.6% in value in 1984 compared with 1983. Imports of nonleather athletic footwear, however, were down 27%.

Nevertheless, according to an analysis of the domestic athletic shoe industry by the Sporting Goods Manufacturers Association (SGMA), the overall industry was judged to be in good shape despite the internal shifts taking place in consumer footwear preferences. Manufacturers sales were expected to remain level in 1985, at about $2.2 billion in wholesale value. However, profits were expected to drop to a three-year low, following a record performance of 6% return on sales in 1983.

Market leader Nike was off 2.5% in domestic sales (which reached $620 million in 1984, according to SportStyle, July 15, 1985). Second in dollar volume last year was Converse ($234 million), followed by Adidas ($185 million).

The changes occurring in the consumer market are reflected in the fact that running shoes accounted for 28.4% of Nikes' footwear revenues (year ending May 1985), compared with 31.5% in 1984, 40.1% in 1983. Basketball increased in share of revenue from 16.4% in 1984 to 25% in the most recent period; racquetball shoes, from 10.7% to 13.1% in the same period; field sports footwear, from 5.5% to 7.2%.

PRODUCT SHIPMENTS

Shipments by Class of Customer

The latest information issued by the Census Bureau covering the distribution of U.S. manufacturers' shipments (value) by class of customer is for the year 1980. Independent wholesalers are of minor importance in the footwear distribution picture.

Distribution of Manufacturers' Sales of Shoes & Slippers
By Class of Customer, 1980
(Not including Rubber/Plastic Footwear)

	Men's Shoes Exc. Athletic	Women's Shoes Exc. Athletic	Athletic Footwear	All Other Footwear	Slippers
Total shipments	100.0%	100.0%	100.0%	100.0%	100.0%
Retail stores & outlets of this company	22.9	18.4	37.9	23.1	5.6
Independent retailers	27.0	32.0	10.6	28.5	22.7
All other retailers	38.5	39.1	22.7	29.0	59.3
Wholesalers	8.2	7.4	28.3	18.5	10.2
All others, incl. govt. & for export	3.4	3.1	0.8	0.9	2.2
Total sales (mil. $)	$2,000.2	$1,763.6	$ 245.9	$ 469.4	$ 253.1

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Series MA-31A.

PRODUCER (FACTORY) PRICES

Preliminary information on the level of producer (factory) prices for U.S.-made footwear issued by the U.S. Bureau of Labor Statistics for the month of August 1985 showed prices averaging 3.0% above the level in the same month last year for nonrubber footwear. Rubber/plastic footwear prices were up 0.8%. On a seasonally adjusted basis, July prices for nonrubber footwear averaged 0.3% above July while rubber/plastic footwear prices showed no change.

The latest available detailed data on footwear producer prices by type of footwear covers May, 1985 averages, included in the table below.

Producer Price Indexes on Footwear
As of May, 1983-1985

		Index for May		
	Base Period	1985	1984	1983
All footwear	1967	253.9	251.8	248.7
Men's footwear	1967	288.7	290.2	282.9
With leather upper	1967	290.5	291.0	283.2
Dress, casual	12/80	104.5	107.8	104.6
Boots	12/80	115.1	109.7	111.2
Work shoes, boots	12/80	118.5	114.3	109.7
Other	12/80	114.7	108.3	103.5
With plastic upper	12/80	101.3	105.9	105.5

(continued)

PRODUCER (FACTORY) PRICES

Producer Price Indexes on Footwear
As of May, 1983-1985
(continued)

	Base Period	Index for May		
		1985	1984	1983
Women's footwear	1967	231.5	226.5	228.3
With leather upper	1967	224.5	219.7	224.6
Dress	12/80	112.1	109.0	103.0
Casual	12/80	106.0	97.4	98.9
Sandals	12/80	80.1	92.4	107.1
Boots	12/80	nr	111.0	109.1
Other	12/80	128.0	123.7	111.9
With plastic upper	12/80	103.8	103.3	99.9
Children's footwear (size 8 1/2-12)	1967	215.5	214.2	208.5
Misses' footwear (size 12 1/2-2 1/2)	6/80	103.7	102.7	101.1
Youths' & boys' (size 12 1/2-6)	6/80	120.0	120.0	112.8
Infants', babies (size 1-8)	6/80	116.4	115.5	110.2
Athletic footwear *	6/80	106.0	104.1	101.5
Rubber/plastic (incl. protective footwear)	1967	216.2	234.1	225.2

* Month of April
nr not reported

Source: U.S. Bureau of Labor Statistics.

As of May 1985, producer prices on all types of men's footwear in the non-rubber category were up 5.2% compared with May 1983. Other changes: women's footwear, +3.2%, children's, +3.4%; misses', +2.6%; youths'/boys' + 6.4%; infants'/babies; +5.6%, and athletic footwear, +4.4% The May 1985 the producer price index for rubber/plastic footwear was almost 4% below the May 1983 level.

FOREIGN TRADE

For the third consecutive year, in 1984 nonrubber footwear imports into the U.S. rose by more than 100 million pairs, continuing the acceleration in imports which began when the four-year Orderly Marketing Agreements (OMAs) with South Korea and Taiwan expired in June 1981, and when the U.S. dollar registered increasing strength against foreign currencies.

Imports of nonrubber footwear reached 725.9 million pairs last year, up 24.7% compared with 1983, and had a Customs Value of over $4.6 billion--27% above the 1983 total. Gains in imports of rubber/plastic footwear were less spectacular--up 6.8% in quantity and 7.5% in value. Year-to-date nonrubber footwear imports in the first seven months of 1985 were up 9.6% compared with the same 1984 period in terms of pairs, and there were indications that gains may be slowing down.

FOREIGN TRADE

For 1984, imports represented 69.5% of the total U.S. market supply of footwear (pairs), up from 56.4% in 1982. In terms of value, comparable figures were 54.4% and 43.2%, respectively, based on Census Bureau data. As of the first half of 1984, according to the International Trade Commission (ITC), the average U.S. factory price of domestic nonrubber footwear was 125% higher than the import price. The price disparity, added by the strong U.S. dollar and by lower production costs overseas, grew from 95% in 1982.

Reversing its position of a year earlier, in May 1985 the ITC issued a finding that the domestic footwear industry was being damaged by imports and should be protected by quotas for the next five years. The ITC recommendation was designed to cut imports of shoes valued at $2.50 or more per pair (Customs Value) by 35% and to dispense import quotas through an auction system. It was submitted to President Reagan for approval, rejection, or modification while the diverse interests represented within the industry took opposing stands.

Strongly supporting controls were U.S. manufacturers with no direct involvement in overseas production. Opposed were importers, including U.S. manufacturers with plants overseas (whose output is reported to account for some 21% of U.S. imports). None of the athletic shoe companies are purely domestic manufacturers or purely importers. Nike, for example, imports 90% of its footwear. Also opposed to imposition of quotas were large retailers and retailer groups who claimed they would raise prices and limit supplies. The ommission of footwear valued at under $2.50 per pair was viewed in some quarters, as a series flaw in the proposal, as these are said to account for over 20% of footwear imports.

The President announced his decision to reject the ITC proposal at the end of August. Considerations of retaliatory actions on the part of foreign countries and the national economic interest were cited in making this decision to reject any form of import protection for the U.S. footwear industry. It was charged that shoe import quotas would provide minimum benefit to the industry and would cost the U.S. consumer almost $3 billion, as well as damaging relations with U.S. trading partners. According to a statement by the Council of Economic Advisors (CEA), the quota plan would require the U.S. to pay compensation to other countries--usually in the form of reduced U.S. exports--valued at some $2.1 billion--in order to comply with the General Agreement on Tariffs and Trade, to which the U.S. is a party.

The U.S. Trade Representative stated that an analysis of the industry indicated that it will never be price competitive with imports, although segments will remain competitive on the basis of brand loyalty, quality and service. The CEA advised the President that the ITC's five-year quota plan would involve annual consumer costs ranging between $343 million and $572 million; and while it would increase U.S. employment by between 13,000 and 22,000 jobs, the cost to consumers of each job would be $26,300, compared with the average shoe worker's annual pay of $14,000.

Despite gloomy prospects for relief, the U.S. nonrubber manufacturers with a strong stake in survival are turning attention to possible legislative action by Congress, couched in a form that would withstand a Presidential veto. A possible tactic under consideration would entail the attachment of a footwear protection amendment to pending textile trade enforcement legislation as it moves through Congress.

FOREIGN TRADE

Imports

Meanwhile, the steps which large manufacturers have taken to survive will no doubt increase--including the importation of components for assembly in the U.S. as well as imports of finished footwear made in manufacturer-owned plants abroad, as manufacturer-owned retail outlets, and investment in new technology, including robotics and computerized operations. However, most of these life-saving measures are out of reach for many small and medium-size producers. Further consolidation and concentration of domestic companies in the footwear industry appears inevitable.

Foreign-mades continue to account for an increasing share of the U.S. market for rubber/plastic footwear of all types. Imports first became significant about 1960 and within a few years accounted for 25% of all rubber and plastics footwear sold in the U.S. By 1970, the import's share was 30%; 50% in 1980; about 60% in 1984.

Imports of Footwear -- Percent of Apparent U.S. Consumption, 1982-1984

	1984		1983		1982	
	Pairs	Value	Pairs	Value	Pairs	Value
Total footwear consumption*	69.5%	54.4%	62.2%	44.7%	56.4%	43.2%
Shoes & slippers (nonrubber)	71.3	55.0	63.6	45.0	57.8	43.1
Leather	68.9	na	59.3	na	52.7	na
Plastic	78.8	na	71.8	na	67.0	na
Other	63.7	na	62.9	na	55.9	na
Footwear with rubber or plastic soles/fabric uppers	62.9	51.6	57.2	43.5	52.0	44.3
Rubber/plastic protective footwear	47.9	43.4	46.9	41.8	45.1	41.2

* Includes U.S. production less exports plus imports for consumption in the U.S.

Source: U.S. Bureau of the Census, Current Industrial Reports.

A special report by the ITC traced the impact of imports by type of footwear from 1979 through 1983.

Nonrubber Footwear: U.S. Imports Relative to U.S. Consumption & To Production, 1979-1983

	1983	1982	1981	1980	1979
Ratio of Imports to Consumption					
Nonrubber footwear, total	63.6	59.0	51.0	49.5	50.9
Men's, youths', boys'	61.4	57.3	42.6	41.2	41.0
Women's, misses'	69.8	64.7	61.2	59.5	63.4
Children's, infants'	60.1	50.7	40.9	36.9	37.8
Athletic	85.8	85.3	78.6	82.9	69.0
All other	0.3	0.3	0.1	0.1	0.2

(continued)

Imports (continued)

Nonrubber Footwear: U.S. Imports Relative to U.S. Consumption & To Production, 1979-1983

	1983	1982	1981	1980	1979
Ratio of Imports to Production					
Nonrubber footwear, total	170.5	140.1	101.0	94.7	101.4
Men's, youths', boys'	155.1	128.9	71.3	67.3	67.6
Women's, misses'	226.2	179.8	153.8	143.5	170.1
Children's, infants'	148.8	101.7	68.4	57.8	59.9
Athletic	541.3	522.6	321.3	356.2	196.6
All other	0.3	0.3	0.1	0.1	0.2

Source: U.S. International Trade Commission based on U.S. Bureau of the Census reports.

FOREIGN TRADE

Imports (continued)

U.S. Footwear Imports by Type, 1983, 1984

	1984					1983		% Change 1984/1983	
	Pairs (Mil.)	% of Total	Value # (Mil.$)	% of Total	Avg. Value Per Pair	Pairs (Mil.$)	Value # (Mil.$)	Pairs	Value
Footwear, total	867.2	100.0	$5,007.4	100.0	$ 5.77	741.1	$3,993.1	+ 21.4	+ 25.4
Nonrubber footwear, total	725.9	83.7	4,651.4	92.9	6.41	581.9	3,662.0	+ 24.7	+ 27.0
Rubber/plastics footwear, total	141.3	16.3	354.0	7.1	2.52	132.3	331.1	+ 6.8	+ 7.5
By type of footwear:									
Men's & boys', total	199.6	23.0	1,531.5	30.6	7.67	183.0	1,298.5	+ 9.1	+ 17.9
Women's & misses', total	419.7	48.4	2,634.7	52.6	6.28	316.9	1,975.7	+ 32.4	+ 33.4
Children's & infants', total	68.9	7.9	217.8	4.3	3.16	55.3	164.6	+ 24.5	+ 33.0
Type not specified, total	32.7	4.3	267.3	5.3	7.10	26.7	223.2	+ 41.2	+ 19.8
Dress & casual footwear, total	45.5	47.9	3,012.0	60.1	7.25	321.8	2,263.4	+ 29.1	+ 33.1
Leather uppers, total (N)	242.1	27.9	2,391.3	47.7	9.88	179.0	1,739.5	+ 35.2	+ 37.5
Men's & boys'	52.3	6.0	606.4	12.1	11.59	40.1	454.8	+ 30.3	+ 33.3
Women's & children's	198.3	21.7	1,765.9	35.3	9.38	137.3	1,267.5	+ 37.1	+ 39.3
Other, not specified	1.5	0.2	19.0	0.4	12.96	1.6	17.1	- 6.9	+ 10.6
Lined vinyl uppers, total (N)	173.4	19.9	620.7	12.4	3.58	142.7	523.9	+ 21.5	+ 18.5
Men's & boys'	23.0	2.6	98.0	2.0	4.26	22.1	91.9	+ 3.7	+ 6.7
Women's & misses'	133.5	15.4	475.1	9.5	3.56	105.8	391.8	+ 26.2	+ 21.3
Children's & infants'	16.9	1.9	47.6	0.9	2.82	14.8	40.2	+ 14.4	+ 18.3
Athletic, total	229.3	26.4	1,196.6	23.9	5.22	190.5	916.0	+ 20.3	+ 30.6
Leather uppers, total (N)	111.2	12.8	827.3	16.5	7.44	79.2	580.0	+ 40.4	+ 42.6
Men's & boys'	72.2	8.3	585.6	11.7	8.11	55.2	437.4	+ 30.6	+ 33.9
Women's & children's	38.7	4.5	236.9	4.7	6.12	23.7	138.8	+ 63.5	+ 70.7
Ski boots	0.4	*	4.8	0.1	12.86	0.3	3.8	+ 24.2	+ 27.4
Fabric uppers, total (R)	107.7	12.4	270.5	5.4	2.51	102.5	256.9	+ 5.1	+ 5.3
Joggers	16.3	1.9	58.8	1.2	3.60	12.7	41.9	+ 28.6	+ 40.3
Sneakers	51.5	5.9	147.7	2.9	2.87	51.9	151.4	- 0.7	- 2.4
Other	39.8	4.6	63.9	1.3	1.60	37.9	63.6	+ 5.0	+ 6.0
Lined vinyl uppers, total (R)	10.3	1.2	98.8	2.0	9.56	8.8	79.1	+ 17.1	+ 25.0
Mens' & boys'	5.2	0.6	24.3	0.5	4.58	0.7	2.3	+ 12.5	+ 28.4
Women's & misses'	2.1	0.2	8.3	0.2	3.90	2.1	8.1	+ 0.6	+ 2.7
Children's & infants'	1.1	0.1	3.4	0.1	2.97	0.7	2.3	+ 51.1	+ 44.7
Ski boots	1.8	0.2	62.8	1.2	35.60	1.2	49.7	+ 41.8	+ 26.4
Work footwear, leather, total (N)	9.1	1.0	111.1	2.2	12.26	8.0	93.7	+ 12.6	+ 18.5
Boots & protective footwear, nonleather, total (R)	16.0	1.8	80.3	1.6	5.02	13.5	69.5	+ 18.2	+ 15.5
Other footwear, total	197.3	22.7	607.3	12.1	3.08	180.2	650.5	+ 9.4	- 6.6
Unsupported rubber or plastic, total (N)	60.4	7.0	187.5	3.7	3.10	30.1	102.6	+100.4	+ 82.8
Men's & boys'	8.1	0.9	30.3	0.6	3.75	5.3	20.2	+ 51.8	+ 49.7
Women's & misses'	46.5	5.4	143.7	2.9	3.09	21.5	73.7	+116.6	+ 94.9
Children's & infants'	5.8	0.7	13.5	0.3	2.33	3.3	8.6	+ 73.4	+ 56.8
Zories (R)	17.6	2.0	5.2	0.1	0.29	16.2	4.7	+ 8.2	+ 9.7
Fiber uppers (N)	41.5	4.8	118.7	2.4	2.86	37.5	106.2	+ 10.6	+ 11.8
Wood (N)	0.6	0.1	3.5	0.1	5.70	1.2	7.2	- 48.1	- 51.7
Other (N)	77.2	8.9	242.5	5.8	3.79	95.2	429.8	- 18.8	- 31.9

(N) Nonrubber (R) Rubber

# The import value (Customs Value) is the wholesale value at the foreign port of exit. It does not include freight insurance and other charges, such as U.S. import duties, incurred in bringing the merchandise to the U.S.

* Less than 0.1%.

Source: Fairchild Market Research Division based on
U.S. Department of Commerce, Bureau of the Census data.

FOREIGN TRADE

Exports

In spite of the strong dollar which has been an impediment to U.S. exporters, the U.S. footwear industry managed to increase its exports--shipping to more than 90 countries--in 1984. In quantity, nonrubber footwear exports in 1984 rose 18.5% compared with 1983, and gained 2.9% in value, according to the Department of Commerce. Exports of footwear with rubber or plastic soles, fabric uppers, however, declined almost 7% in quantity but more than doubled in value. Rubber/plastics protective footwear registered a 9.0% drop in exports in 1984 compared with 1983, while value rose almost 23%.

The strong demand overseas for American-made athletic footwear was the main factor in export gains. Footwear Industries of America reported exports of running shoes in 1984 were up 122% in quantity; other sports shoes, up 67.4%.

Japan, which maintains import quotas on all footwear except athletic types was the biggest customer for U.S. footwear, accounting for about 31% of total exports. Canada's import quotas on footwear, imposed in 1983, continued to restrain U.S. exports in that market; and the FIA reported U.S. shipments last year were down 38%, but the FIA reported a sharp (126.8%) gain in exports of footwear in Mexico.

The FIA reported gains in exports of nonrubber footwear in the first quarter of 1985. Compared with the same 1984 period, quantity was reported to be up 51.8%; value, up 22.5%. However, rubber/plastics footwear exports were down 59% in this span.

Exports of Domestic Footwear, 1983, 1984
(Quantity in thousands of pairs; value in millions of dollars)

	Quantity		Value		% Change 1984/1983	
	1984	1983	1984	1983	Quantity	Value
Total footwear	10,302	9,004	$111.4	$101.5	+ 14.5%	+ 9.9%
Nonrubber shoes & slippers	8,886	7,496	98.5	95.7	+ 18.5	+ 2.9
Leather footwear	2,009	2,422	35.3	48.5	- 17.1	- 27.2
Plastic footwear	2,647	1,338	28.6	16.6	+ 97.8	+ 72.3
All other footwear	4,230	3,736	34.6	30.6	+ 13.2	+ 13.1
Footwear with rubber or plastic soles/fabric uppers	1,120	1,203	10.2	3.6	- 6.9	+183.3
Rubber/platic protective footwear	296	305	2.7	2.2	- 2.9	+ 22.7

Source: U.S. Bureau of the Census, Current Industrial Reports.

FOREIGN TRADE

Exports (continued)

Large quantities of cut shoe parts are shipped to South American and Caribbean countries, particularly Trinidad, the Bahamas, the Northern Antilles, the Dominican Republic, Colombia and Bermuda, where the parts are assembled at low cost and re-exported to the U.S. Duties here are then assessed on the value added. Operations requiring less labor are in many cases done in the U.S.

MARKET SUPPLY

The total U.S. supply of footwear, based on U.S. production less exports plus imports (also referred to as "apparent consumption") reached 1.2 billion pairs in 1984, up from 1.1 billion in 1983, according to the Department of Commerce. (As previously noted, imports were reported to account for 69.5% of the quantity of footwear in the U.S. market last year, and 54.4% of value).

Summary of Market Supply, 1983, 1984
(Quantity in millions of pairs)

	Domestic Production		Exports		Imports		Market Supply	
	1984	1983	1984	1983	1984	1983	1984	1983
Total footwear	383.6	432.7	10.3	9.0	849.4	696.2	1,222.8	1,119.9
Shoes & slippers	301.4	339.2	8.9	7.5	725.8	580.2	1,018.3	911.9
Leather footwear	165.2	178.1	2.0	2.4	362.4	268.7	525.6	453.4
Plastic footwear	72.0	74.6	2.6	1.3	258.2	186.5	327.5	259.7
All other footwear	64.2	77.5	4.2	3.7	105.1	125.0	165.1	198.7
Footwear with rubber or plastic soles/fabric uppers	64.5	78.0	1.1	1.2	107.7	102.7	171.1	179.5
Rubber/plastic protective footwear	17.7	15.5	0.3	0.3	16.0	13.4	33.4	28.5

Source: U.S. Bureau of the Census, Current Industrial Reports (MA31A).

Based on information by shoe classification pertaining to about 77% of the 1984 total market supply, Footwear Industries of America has compiled data showing the following market share (pairs).

Market Supply By Shoe Type, 1983, 1984

	1984	1983
Total market supply	100.0%	100.0%
Men's footwear	20.2	24.9
Women's	51.7	53.2
Juvenile	14.1	8.8
Athletic	14.0	13.1

Source: Based on FIA Quarterly Reports.

RETAIL TRADE

Consumer Expenditures

Preliminary figures on personal consumption expenditures for footwear, compiled by the U.S. Bureau of Economic Analysis, place the total value of footwear reaching the consumer through any channel in 1984 at $22,122 million. This was 8.1% above the total of $20,455 million reported in 1983. On a constant, (1972), dollar basis, eliminating inflation, footwear expenditures in 1974 were up 6.4%, compared with 1983 while overall spending for clothing and shoes registered a 9.0% gain in real terms.

Personal Consumption Expenditures For Footwear, 1981-1984
(Millions of current dollars)

	1984(p)	1983(r)	1982(r)	1981(r)
Shoes & other footwear	$22,122	$20,455	$19,350	$18,395

(p) preliminary (r) revised

Source: U.S. Bureau of Economic Analysis, Survey of Current Business, (July 1985).

According to market projections by Kurt Salmon, continued gains in consumer expenditures for footwear are expected in 1985, with personal consumption expenditures rising 7% to $23.7 billion. Women's shoes are expected to register the largest gain, with more high heel models to match the dress-up look. Advances are also expected in flat casuals.

An on-going study covering consumer expenditure patterns, on a household basis, is now being compiled by the U.S. Bureau of Labor Statistics and the Census Bureau. Data on footwear spending patterns for 1980 and 1981 have been released and projections of these findings show the following pattern in spending share, based on householder's age and on household income. (A householder is the person who owns or rents the home).

Percent of Total Spending For Footwear, 1980-81 Average

	Percent
Total	100.0
By age of householder:	
Under 25 years	7.7
25 - 34 years	25.1
35 - 44 years	26.1
45 - 54 years	18.3
55 - 64 years	14.0
65 & over	8.8
By household income before taxes	
$30,000 & over	37.0
$20,000 - $29,999	24.8
$15,000 - $19,999	12.0
$10,000 - $14,999	10.4
Under $10,000	15.8

Source: Fairchild Market Research Division, based on U.S. Bureau of Labor Statistics Consumer Expenditure Survey: 1980-81 Interview (USDL News Release 84-514), December 1984.

Consumer Expenditures (continued)

Patterns in consumer spending for footwear are traced on a continuing basis by Footwear Market Index (FMI), an independent research organization which tracks consumer spending for all types of footwear through reports derived from a panel of 40,000 families (increased to 50,000 in 1985) in each of three four-month reporting periods during the year.

Projected data based on panel information shows the following distribution in spending by classification in 1984.

Consumer Experditures For Foowtwear By Classification, 1984

	Quantity	$ Expenditures
Total footwear	100.0	100.0
Women's	54.9	52.1
Men's	26.2	35.9
Juvenile	18.9	12.0
Boys'	7.2	4.6
Girls'	6.6	3.9
Infants'	5.1	2.8

Source: Footwear Market Index (FMI),
Kormos, Harris & Assoc., Nashville, TN.

Size of the Consumer Market

Population Projections - 1984, 1994, 2005
(Middle Series*)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
MALE							
Total, all ages	115,073	125,464	134,297	+ 16.7%	100.0%	100.0%	100.0%
Under 5 years	9,329	9,635	8,931	- 4.3	8.1	7.7	6.6
5 to 9 years	8,296	9,866	9,094	+ 9.6	7.2	7.9	6.8
10 to 15 years	10,708	11,245	11,698	+ 9.2	9.3	9.0	8.7
16 years & over	86,742	94,718	104,574	+ 20.5	75.4	75.4	77.9
16 - 19	7,653	6,712	8,058	+ 5.3	6.6	5.3	6.0
20 - 34	31,522	29,725	27,416	- 13.0	27.4	23.7	20.4
35 - 54	25,975	35,187	40,769	+ 56.9	22.6	28.0	30.4
55 - 64	10,375	9,793	14,060	+ 35.5	9.0	7.8	10.5
65 & over	11,217	13,300	14,271	+ 27.2	9.7	10.6	10.6
Median age (years)	29.9	33.0	36.0	+ 20.4	--	--	--

(continued)

Size of the Consumer Market (continued)

Population Projections - 1984, 1994, 2005
(Middle Series*)
(continued)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
FEMALE							
Total, all ages	121,343	132,251	141,381	+ 16.5%	100.0%	100.0%	100.0%
Under 5 years	8,904	9,188	8,518	- 4.3	7.3	6.9	6.0
5 to 9 years	7,924	9,415	8,678	+ 9.5	6.5	7.1	6.1
10 to 15 years	10,236	10,745	11,167	+ 9.1	8.4	8.1	7.0
16 years & over	94,279	102,903	113,018	+ 19.9	77.7	77.9	80.0
16 - 19	7,357	6,426	7,707	+ 4.8	6.1	4.9	5.5
20 - 34	31,205	29,068	26,706	- 14.4	25.7	22.0	18.9
35 - 54	27,115	36,202	41,249	+ 52.1	22.3	27.4	29.2
55 - 64	11,834	11.002	15,399	+ 30.1	9.8	8.3	10.9
65 & over	16,768	20,205	21,957	+ 30.9	13.8	15.3	15.5
Median age (years)	32.4	35.6	39.2	+ 21.0	--	--	--
TOTAL, MALE & FEMALE							
Total, all ages	236,416	257,714	275,677	+ 16.6%	100.0%	100.0%	100.0%
Under 5 years	18,232	18,823	17,449	- 4.3	7.7	7.3	6.3
5 to 9 years	16,219	19,281	17,772	+ 9.6	6.9	7.5	6.5
10 to 15 years	20,944	21,991	22,865	+ 9.2	8.9	8.5	8.3
16 years & over	181,021	197,619	217,591	+ 20.2	76.5	76.7	78.9
16 - 19	15,009	13,138	15,765	+ 5.0	6.3	5.1	5.7
20 - 34	62,726	58,792	54,122	- 13.7	26.5	22.8	19.6
35 - 54	53,090	71,389	82,018	+ 54.5	22.4	27.7	29.7
55 - 64	22,210	20,793	29,459	+ 32.6	9.4	8.1	10.7
65 & over	27,986	33,507	36,227	+ 29.4	11.8	13.0	13.1
Median age (years)	31.1	34.3	37.6	+ 20.9	--	--	--

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 952 (May 1984).

RETAIL TRADE

Consumer Prices

In a six-month period ending July 1985, the consumer price index covering all urban consumers (U.S. city average) for footwear was up 2.9% on a seasonally adjusted annual rate compared with the same period a year earlier. For the year 1984, the index registered a gain of 1.3%. (Latest available detailed indexes are for the month of June 1985, as noted below).

Footwear Consumer Price Index
(All Urban Consumers)

	Base Period	June* 1985	May 1985*	Annual Average 1984	1983	1982	% Change 1984/83
Footwear	1967=100	213.9	213.2	209.5	206.9	205.5	+ 1.3%
Men's	Dec. 1977=100	139.8	139.8	136.7	133.6	132.0	+ 2.3
Women's	Dec. 1977=100	127.7	128.1	125.9	125.6	125.5	+ 0.2
Boys', girls'	Dec. 1977=100	136.8	134.6	132.9	130.9	130.0	+ 1.5

* Unadjusted indexes.

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

Leading Markets

Sales & Marketing Management Magazine compiles data annually on retail sales of major merchandising classifications by metropolitan markets. Following is information reported on the top 10 markets covering footwear sales in 1983.

Footwear Sales in Leading Metropolitan Markets, 1983

Rank		Thousands ($)
1	New York, New York	$ 729,756
2	Los Angeles-Long Beach, California	652,529
3	Boston-Lawrence-Salem-Lowell-Brockton	607,548
4	Chicago, Illinois	588,133
5	Detroit, Michigan	336,437
6	Houston, Texas	334,015
7	Philadelphia, Pennsylvania	327,508
8	Washington, DC	309,515
9	Dallas, Texas	250,134
10	Nassau-Suffolk, New York	226,584
	Sub-total	4,362,159
	Percent of U.S.	25.6%
	U.S. total	$17,026,397

Source: Sales & Marketing Management
Part II, Annual Survey of Buying Power
(October 29, 1984).

RETAIL TRADE

Retail Sales By Type of Outlet

Official figures on share of footwear retail sales (dollar volume), by type of outlet will be released by the U.S. Department of Commerce, Census Bureau, later this year in reports covering merchandise line sales based on the 1982 census of retail trade.

In terms of reported purchases of footwear (pairs), Footwear Market Index (FMI) data shows the following shares of the total by specified types of retail outlets in 1984.

Percent of Total Market By Shoe Type & Store Type, 1984

	Total	Men's	Women's	Boys'	Girls'	Infants'
Total market (pairs)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Retail outlet type:						
Shoe stores	38.7	36.1	38.9	31.5	42.1	46.7
Discount stores, incl. K mart	17.0	16.4	13.6	26.9	25.0	27.0
Department stores	12.6	9.4	15.7	7.3	9.1	6.6
National catalog chains	12.4	13.1	11.4	18.3	12.1	9.6
Sporting goods stores, pro shops	3.4	7.1	2.0	3.9	1.5	0.2
Factory outlet	3.3	3.9	3.5	2.0	1.8	0.7
Apparel specialty stores	2.7	3.0	2.7	1.5	1.6	2.4
Mail order	2.1	3.3	2.1	0.1	0.2	--
Other retail outlets	7.8	7.7	10.1	8.5	6.6	6.8

Source: Kormos, Harris & Associates, Footwear Market Index.

The best performance in 1984-1985 in shoe retailing has been among the shoe chains--but specifically among off-price and one-price footwear retailers who are continuing to penetrate the market, although the rate of gains made by off-price operations has slowed down from the heady pace of 1984. Operators of these stores indicate continued plans to expand while the plans of traditional footwear chains to open stores show a slow-down.

Recognizing that the best opportunity for growth lies in the retailing arena rather than in domestic footwear manufacturing operations, shoe firms continue to diversify and expand their retailing operations into shoe specialty and/or apparel specialty stores, as well as leased departments.

The Brown Shoe Group increased its specialty stores from 1,768 in fiscal 1983 to 1,902 in 1984; the number of Famous Footwear stores, Brown's chain of branded discount stores, was increased from 121 to 190. In fiscal 1984, Genesco operated 744 stores in the U.S., which accounted for 44% of Genesco's total volume (up from 34% in 1980), and 60% of Genesco's total footwear business including manufacturing.

RETAIL TRADE

Retail Sales By Type of Outlet

Volume Shoe Corp., Topeka, Kansas owned by May Department Stores Co., St. Louis, MO , with a total of over 1,600 stores under the Payless Shoe Source, Volume Shoe Corp., and Trade Style names, plans to add over 1,000 more stores nationwide by 1988. U.S. Shoe Corp., Cincinnati, and Morse Shoe have also announced plans to open more stores in the next few years. Melville's Thom McAn Division--which had 1,126 stores nationwide in 1984--plans to add 10 more in 1985, 20 each year thereafter until 1988, according to trade reports. In their Open Country outdoor footwear division (92 stores in 1984), 10 will be opened in 1985 and 15 each year until 1988. Edison has announced plans to expand in the Bakers/Leeds Shoe store Division (710 stores), Barts Shoe Store Division (89) and Chandler's (121).

Under pressure from the blanketing of the best retail trading areas by the chains and by price competition from the off-price retailers, independent shoe retailers had a difficult year in 1984, and had a lot of excess inventory to work off. The National Shoe Retailer Association (NSRA) 1984 Shoe Store Operations report showed a drop in gross margins. Pressure was expected to continue in 1985 to try to maintain inventory turnover.

Department stores are fighting competition from discount chains that are selling name brands at sharply reduced prices by putting much greater emphasis on their own private labels. It is reported that many department stores plan to continue to increase private label importing as the best means to fight discounters as well as to enhance store image and obtain higher profit margins. Besides direct importing, many retailers use importers who have established relationships with strong factories, thus helping to ensure quality control.

Minimum pairage requirements on private label imports are a major problem for smaller retailers. However, some retailers are getting around this problem by banding together to form group buys.

Sales and Operating Profits of Leading Footwear Retailers
(In millions of dollars)

	Footwear Sales			Footwear Operating Profit		
	1984	1983	% Change 1984/1983	1984	1983	% Change 1984/1983
RETAILERS						
Melville Corp.	$1,423.3	$1,338.8	+ 6.3%	$153.1	$127.9	+ 19.7%
Woolworth Co. (Kinney)	1,419.0	1,264.0	+12.3	155.0	121.0	+ 28.1
Brown Group	1,127.5	1,055.3	+ 6.8	89.9	107.1	- 16.1
Morse Shoe	526.5	523.0	+ 0.7	24.7	42.9	- 42.4
Edison Bros. Stores	513.8	539.7	- 4.8	25.0	69.1	- 63.8
TOTAL	5,010.1	4,720.8	+ 6.1	447.7	468.0	- 4.3

Source: Annual Financial Statements.

Retail Sales by Type of Outlet: Shoe Stores

For the year 1984, shoe stores of all types hit a total sales volume of over $10 billion for the first time, gaining 5.6% compared with the 1983 total. This compares with a 7.1% gain registered in 1983 over 1982. The chains did better than the overall average, registering a sales gain of 7.1% in 1984, and 9.8% in 1983 compared with the previous year.

In the first six months of 1985, however, on a seasonally adjusted basis, shoe stores in chains of eleven or more stores registered a gain of only 4.7% compared with an overall gain in shoe store sales of 6.8% over the first six months of 1984.

Shoe Store Sales, 1983, 1984, First Six Months of 1985
(Millions of dollars)

	1984	1983	1st 6 Mos. 1985/1984	Percent Change 1984/1983	Percent Change 1983/1982
Shoe stores, total	$10,339	$9,797	+ 6.8%	+ 5.6%	+ 7.1%
In chains of 11 or more stores	5,099	4,761	+ 4.7	+ 7.1	+ 9.8

Source: U.S. Bureau of the Census.

A detailed profile of shoe stores is obtained through the reports on the 1982 census of retail trade conducted by the U.S. Census Bureau.

According to this report, the eight largest firms in shoe retailing owned over a third of the nation's shoe stores (34.6%), and these accounted for almost 38% of total shoe store sales in 1982.

Sales Concentration Among Largest Shoe Store Firms, 1982

	Stores		Sales	
	Number	%	Mil. $	%
Firms with payroll, total	36,277	100.0%	$11,275.4	100.0%
4 largest firms	8,462	23.3	3,079.1	27.3
8 largest firms	12,557	34.6	4,244.2	37.6
20 largest firms	17,515	48.3	5,661.1	50.2
50 largest firms	19,271	53.1	6,345.0	56.3

Retail Sales By Type of Outlet: Shoe Stores (continued)

Shoe Store Firms, Stores & Sales, 1982

	Firms		Stores*		Sales*	
	Number	%	Number	%	Numoer	%
Total	12,449	100.0%	36,277	100.0%	$11,134.7	100.0%
Single unit organizations	10,551	84.8	10,551	29.1	2,591.3	23.3
Multi-unit organizations	1,898	15.2	25,726	70.9	8,543.4	76.7
No. of stores:						
Under 10	1,754	14.1	4,565	12.6	1,723.2	15.5
10 - 24	79	0.6	1,175	3.2	448.3	4.0
25 - 49	28	0.2	887	2.4	320.8	2.9
50 - 99	12	0.1	818	2.3	227.2	2.0
100 or more	25	0.2	18,281	50.4	5,823.8	52.3
Firms operated entire year	11,744	100.0	35,512	100.0	11,046.6	100.0
Annual sales of firms:						
$10 mil. or more	61	0.5	19,538	55.0	6,467.8	58.5
5 mil. - $9.9 mil.	73	0.6	1,021	2.9	499.7	4.5
2.5 mil. - $4.9 mil.	141	1.2	1,072	3.0	504.7	4.6
1.0 mil. - $2.49 mil.	595	5.1	1,677	4.7	902.2	8.2
Under $1 mil.	10,874	92.6	12,204	34.4	2,672.2	24.2
Stores By Type & Sales Size of Stores						
Family shoe stores, total	8,140		23,298		7,313.6	
Operated entire year			21,860	100.0	6,872.8	100.0
Store sales:						
$ 5.0 mil. - $25.0 mil.			10	0.2	70.3	1.0
2.5 mil. - 4.9 mil.			31		101.9	1.5
1.0 mil. - 2.49 mil.			498	2.3	684.4	10.0
0.5 mil. - 0.99 mil.			2,714	12.4	1,807.0	26.3
Under $0.5 mil.			18,607	85.1	4,209.2	61.2
Women's shoe stores, total	2,980		7,832		2,633.1	
Operated entire year			7,347	100.0	2,489.7	100.0
Store sales:						
$ 2.5 mil. - $ 9.9 mil.			27	0.4	107.1	4.3
1.0 mil. - 2.49 mil.			268	3.6	362.8	14.6
0.5 mil. - 0.99 mil.			947	12.9	634.5	25.5
0.25 mil. - 0.49 mil.			2,460	33.5	852.3	34.2
Under $0.25 mil.			3,645	49.6	533.0	21.4
Stores By Types & Sales Size of Stores						
Men's shoe stores, total	1,099		4,153		1,110.7	
Operated entire year			3,925	100.0	1,050.4	100.0
Store sales:						
$ 2.5 mil. - $10.0 mil.			10	0.2	47.7	4.5
1.0 mil. - 2.49 mil.			73	1.9	106.1	10.1
0.5 mil. - 0.99 mil.			309	7.9	201.8	19.2
0.25 mil. - 0.49 mil.			1,037	26.4	348.9	33.2
Under $250,000			2,496	63.6	345.9	32.9
Juvenile shoe stores, total	589		994		218.0	
Operated entire year			948	100.0	209.9	100.0
Store sales:						
$ 0.5 mil. - $2.5 mil.			44	4.6	30.0	14.3
Under $500,000			904	95.4	179.9	85.7

* Leased department operations are included in these figures as separate shoe stores.

Source: U.S. Bureau of the Census,
Census of Retail Trade (RC82-I-1).

Retail Sales By Type of Outlet: Shoe Stores (continued)

Seasonal Pattern in Shoe Store Sales, 1982-1984
(Percent of Year's Sales By Months)

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1984	7.0%	6.5%	7.9%	9.0%	8.3%	8.2%	7.1%	8.8%	8.7%	8.3%	8.8%	11.5%	100.0%
1983	6.5	6.0	8.3	8.4	8.1	7.9	7.3	8.8	8.7	8.8	9.1	12.0	100.0
1982	7.3	6.6	8.2	9.0	8.2	7.5	7.5	8.6	8.5	8.5	8.6	11.3	100.0

Dates of Easter: 1984: April 22; 1983: April 3; 1982: April 11.

Source: Based on U.S. Bureau of the Census,
Monthly Retail Trade Reports.

A preliminary 1982 census of retail report issued by the Census Bureau showed the following information on the contribution of types of footwear and other merchandise to total shoe store sales that year.

Sales of Major Lines as Percent of Total Shoe Store Sales, 1982
(Leased departments are included as if they were separate stores)

	Percent
Total shoe store sales & other receipts	100.0%
Footwear, except infants' and toddlers'	97.1
Women's and girls'	49.6
Men's and boys'	33.0
Children's	11.2
Footwear accessories	3.3
All other receipts	2.9

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade, (RC82-1-18(P).

Retail Sales By Type of Outlet: Department Stores

According to the 1982 Census of Retail Trade (U.S. Census Bureau), a total of 10,035 department stores were in operation nationwide, compared with 8,807 counted in the 1977 census. Footwear, not including infants' and toddlers' (and excluding leased department sales), accounted for 2.6% of total department store business in 1982, according to a preliminary report. This amounted to about $2.6 billion in footwear sales.

Retail Sales By Type of Outlet: Department Stores (continued)

In the typical department store which had a total volume over $1 million, footwear departments (upstairs stores) contributed 4.7% of total store sales in 1982, according to the National Retail Merchants Association. Among stores reporting on women's and misses' shoe departments (upstairs), this department accounted for a median 3.1% of total store sales. Men's footwear accounted for a median 0.8%; juniors' and teens', 1.1%; children's, 0.3%. (Percents do not add to 4.7% as not all stores reported on each of the four footwear types. Medians are separately calculated for each shoe type.)

Compared with 1982, footwear sales in the typical department store gained 9.2%. Women's dress and casual shoes had a median increase of 9.1% among reporting stores; men's, up 10.3%.

Department Store Footwear Departments: Selected Operating Ratios, 1983
(Stores With A Total Volume Over $1 Million)
(Median Results--Upstairs Departments)

	Total All Shoes	Women's & Misses' Dress/Casual Shoes	Juniors' & Teens' Shoes	Men's Footwear	Children's Footwear
(Number reporting)	40	32	28	35	26
Cumulative markon, %	51.1%	52.1%	51.9%	47.9%	48.2%
Markdowns, % of net sales	20.3	22.6	20.2	14.5	23.6
Gross margin, % of net sales	43.8	44.2	44.9	42.8	40.6
Net sales, % chg. 1983/82	9.2	9.1	23.9	10.3	- 6.7
Net sales, % of total store	4.7	3.2	1.1	0.8	0.3
Returns, % of gross sales	12.1	12.8	13.2	10.5	nr
$ sales per sq. ft. of selling space	$189.9	$275.2	$414.8	$146.9	$55.9
Stock turns (times)	2.2	2.2	2.7	161.6	1.3

nr = not reported.

Source: National Retail Merchants Association, *Merchandising & Operating Results*, (1984 Edition).

Retail Sales By Type of Outlet: Apparel Specialty Stores

A preliminary report on the 1982 census of retail trade (subject to revision), available from the Census Bureau, included the following information on footwear business in specialty stores. (In these reports, leased departments are classified as if they were separate establishments.)

Retail Sales By Type of Outlet: Apparel Specialty Stores (continued)

Specialty Stores With Paid Employees, 1982

	No. of Stores	Footwear, Except Infants' & Childrens' % to Total Store Sales	Footwear, Except Infants' & Childrens' Estimated Sales (Mil. $)
Family clothing stores	17,899	6.7%	$ 902.6
Women's ready-to-wear stores	44,084	1.3	264.0
Men's/boys' wear stores	17,426	3.8	292.1

Source: U.S. Bureau of the Census,
Census of Retail Trade, RC82-1(P).

Women's/Family Specialty Store Operating Results

The typical women's wear and family apparel store with volumes of $1 million or more registered a gain of 7.0% in footwear department business in 1983 compared with 1982, according to the National Retail Merchants Association.

In men's wear stores, according to the Menswear Retailers of America, footwear sales registered a typical increase of 1.7% in stores handling men's/boys' wear only, and a decline of 2.0% in stores that also carry women's wear.

Women's Specialty Stores & Family Clothing Stores: Selected Operating Results For Footwear Departments, 1983

(Total Store Volume Over $1 Million)
(Median Results)

Footwear departments (9*)	
Cumulative markon, %	50.6
Net sales, % of change from 1982	+ 7.0
Net sales, % of total share	7.2
Markdowns, % of net sales	18.6
Gross margin, % of net sales	42.8
Stock turns (times)	2.4

* The number of reporting companies.

Source: National Retail Merchants Association,
Merchandising & Operating Results, (1984 Edition).

Retail Sales By Type of Outlet: Apparel Specialty Stores (continued)

Men's Wear Stores: Selected Operating Ratios for Men's & Boys' Shoe Departments, 1984

(Median results)

	% of Total Store Sales		% Change in Sales 1984/1983		Markdowns % of Men's Shoe Sales		Stock Turns Per Year (times)	
Men's & boys' shoes:								
In men's wear stores handling men's wear only	4.7%	(36)	+ 0.4%	(28)	16.1%	(27)	1.2	(19)
In men's wear stores which also sell women's wear	4.0	(51)	+ 3.8	(38)	13.0	(36)	1.3	(25)

Note: Figures in parentheses cover the number of reporting firms in each ratio.

Source: Menswear Retailers of America, Annual Business Survey, June 1985.

ATHLETIC FOOTWEAR MARKET

The total athletic footwear market, including rugged and walking shoes, as well as other types of active sports footwear, is estimated to have reached a retail value of $4.2 billion, with 207 million pairs in 1984, according to the Sporting Goods Manufacturers Association. (SGMA)

The trend toward high performance shoes for special athletic end-uses has been on the wane, while consumer interest focuses to a greater extent on more casual, leisure styles. Consumers have also diversified their activities. The 10-year running boom that brought the number of active runners from about 5 million to approximately 40 million has been flattening. At the same time, the market comprised of people who wore running shoes for casual use has declined since 1983, as customers turned to more traditional leather footwear and court or aerobic footwear. Changes in the market have also occurred because consumers have become much more diversified in their fitness activities--taking up aerobics, bicycling, racquetball, etc.--each requiring a different type of footwear.

The biggest growth segments, according to a study by the SGMA, are expected to be in basketball, followed by aerobics and tennis. Jogging, which once led the industry, was at the end of the list in expected rate of growth, behind baseball, multi-studded turf shoes and racquetball shoes as a growth area.

A glut in low-end shoes, too many models, as well as too many discount retailers and low margins were seen as major problems facing the athletic footwear industry at the retail level.

Based on a series of purchase tracking among 40,000 U.S. households in three four-month periods in 1984, Footwear Market Index, and Kormos, Harris & Associates, Nashville, TN, has made the following projections on the total market for athletic/tennis footwear.

Purchases of Adult Athletic/Tennis Footwear, 1984
(Percent of pairs)

Total purchases	100.0%
Athletic/jogging footwear	41.7
Men's	22.6
Women's	19.1
Tennis/sneakers	58.3
Men's	28.4
Women's	29.9

Purchases of All Athletic/Tennis Footwear By Classification, 1982-1984
(Percent of pairs)

	1984	1983	1982
Athletic/tennis footwear, total	100.0	100.0	100.0
Men's	36.1	35.1	35.6
Boys'	18.6	18.2	20.0
Women's	35.1	36.2	33.9
Girls'	10.2	10.4	10.4

Source: Footwear Market Index.

American Sport Data, Inc., White Plains, N.Y., conducted a purchase tracking study on the athletic market among 10,000 adults and children which indicated purchases of running shoes totaling more than 75 million pairs in 1984. Sneakers were next in importance, estimated at 50 million pairs, tennis with 29 million pairs, and basketball with 16 million pairs. Total purchases of hiking boots were projected at 7.4 million pairs, and aerobic shoes at 4.2 million pairs.

Consumer interviews showed that 11.6% of adults aged 18 and up have tennis shoes and 15% have running shoes. But among college graduated, 22.2% had tennis shoes, 28.2% running shoes.

Source: Footwear News, July 15, 1985.

Women have become an increasingly important factor in the athletic/sneaker footwear market--particularly because of the demand for aerobic shoes. The National Sporting Goods Association estimates the total value of sales of aerobic footwear reached $53.9 million (1.9 million pairs) in 1984, and women accounted for 92% of this market.

Women account for a higher proportion of the people who buy athletic footwear primarily for comfort, fashion and to have the "active look." They generally look for shoes that will serve more than one purpose and are reported by retailers to be generally more price-conscious, than men are in buying athletic footwear.

ATHLETIC FOOTWEAR MARKET

Women are reported by the NSGA (1984) to account for 40.3% of tennis shoe purchases, 36.4% of jogging/running shoes; 36% of gym shoes/sneakers.

According to the Footwear Market Index (FMI) in 1984, athletic footwear of all types represented 16.6% of total footwear purchases in women's sizes (pairs) but only 4.7% of all footwear was purchased for active sports' participation. In men's sizes, athletic footwear represented 36% of total purchases in 1984; active sports participation was the primary intended use for 9.7% of all men's footwear bought last year.

(Additional information on the athletic footwear market is covered in the sections on PRODUCT SHIPMENTS).

BUYING HABITS

As previously noted, footwear purchases are monitored on a regular basis, covering three four-month periods throughout the year by Footwear Market Index (FMI), conducted by Kormos, Harris & Associates, Nashville, TN. Purchase records for each period, covering footwear for men, women, girls, boys and infants, are obtained through mailings to three demographically balanced nationwide panels of 40,000 households in each period (increased to 50,000 in 1985).

Following are findings on shoe types purchased, place of purchase, etc., based on purchases tracked in 1984.

FMI Profile of Purchases of Men's Footwear, 1984

Total projected pairs purchased	100.0%
Percent distribution	
Styles:	
Dress	30.9
Casual	13.7
Work/Duty	10.4
Athletic (jogging shoes, etc.)/tennis/sneakers	37.1
Western/casual boots	3.2
Other	4.7
Sale vs. regular price:	
Sale price	51.3%
Regular price	48.7
Average price paid (regular & sale)	$ 36.21
Percent of reported purchases by region:	
Northeast	21.9
North Central	24.7
South	33.9
West	19.5

(continued)

FMI Profile of Purchases of Men's Footwear, 1984
(continued)

Total projected pairs purchased	
Percent of purchases by outlet type:	
Catalog chain	13.2%
Department store	9.4
Discount store	16.6
Shoe store	36.4
Sporting goods store/pro shop	7.2
Mail order	3.4
Apparel specialty store	3.1
Factory outlet	4.0
Other	6.7

FMI Profile of Purchases of Women's Footwear, 1984

Total projected pairs purchased	100.0%
Percent distribution	
Styles:	
Pumps	23.1
Other dress shoes	6.4
Sandals (dress & casual)	22.7
Casual/boot/jean	5.2
Loafer/penny mock	6.3
Other casual shoes	9.9
Athletic/tennis	17.2
Work/duty	2.4
Western/casual boot	1.2
Fashion boot	1.8
Other footwear	3.8
Sale vs. regular price:	
Sale price	53.6
Regular price	46.4
Average price paid (regular & sale)	$ 24.86
Percent of reported purchased by region:	
Northeast	22.7%
North Central	24.6
South	34.8
West	13.1
Percent of purchases by outlet type:	
Catalog chain	11.5%
Department store	15.8
Discount store	13.9
Shoe store	39.3
Sporting goods store/pro shop	2.0
Mail order	2.1
Apparel specialty store	2.8
Factory outlet	3.5
Other	9.1

FMI Profile of Footwear Purchases for Boys' Girls' and Infants, 1984

	Boys' Footwear*	Girls' Footwear*	Infants' Footwear*
Projected total pairs purchased	100.0%	100.0%	100.0%
Percent distribution			
Styles:			
Dress , incl. pumps	13.5	18.5	--
Casual & dress sandals	8.4	13.8	--
Work	2.1	0.2	--
Athletic/tennis	69.7	41.7	--
Boots	1.9	1.6	--
Other	4.4	24.2	--
Sale vs. regular price:			
Sale price	50.3%	47.6%	34.5%
Regular price	49.7	52.4	65.5
Average price paid (regular & sale)	$ 16.95	$ 15.44	$ 13.78
Percent of purchases by outlet type:			
Catalog chain	18.6%	12.1%	9.7%
Department store	7.3	9.1	6.5
Apparel Specialty Store	1.5	1.6	2.4
Discount store	27.1	25.0	26.9
Shoe store	34.7	42.1	46.9
Sporting goods/pro shop	3.9	1.6	0.5
Factory outlet	2.0	1.8	0.7
Other	4.9	6.7	6.4

Source: Kormos, Harris', Associates, Nashville, TN, (Footwear Market Index).

Shoe Sizes (Adult)

Distribution of Shoe Purchases By Shoe Size (Men's & Women's
(Percent of Total Footwear Purchases Tracked in 1982)

	Percent
Men's footwear, total	100.0%
Shoe size:	
Under 7	3.8
7 - 7 1/2	6.8
8	6.6
8 1/2	9.6
9	12.7
9 1/2	13.2
10	12.8
10 1/2	12.9
11 - 11 1/2	11.5
12	7.5
Over 12	3.6

Shoe Sizes (Adult) (continued)

Distribution of Shoe Purchases By Shoe Size (Men's & Women's
(Percent of Total Footwear Purchases Tracked in 1982)
(continued)

	Percent
Women's footwear, total	100.0%
Shoe size:	
Under 5	1.1
5 - 5 1/2	6.3
6	8.5
6 1/2	8.0
7	15.5
7 1/2	13.1
8	17.2
8 1/2	9.9
9 - 9 1/2	12.8
10	6.1
Over 10	1.5

Source: Kormos, Harris' & Associates, Nashville, TN (Footwear Market Index).

Teenage Girls

Every two years, Seventeen magazine conducts a survey among a cross-section of teenagers who are members of their Consumer Panels on fall/winter wardrobes--particularly purchases for going back to school.

The most recent survey was conducted in September 1984. Findings represented a nationwide total of 8,543,000 female teenage students. Projected spending for footwear totaled $985,029,000. 93.5% of the girls had purchased shoes, and 32.7% had purchased boots for back-to-school wear.

Back-To-School Footwear Purchases by Teenage Girls

	No. of Pairs	Expenditures
Projected total (thousands)	32,686	$ 985,029
Percent	100.0%	100.0%
Types of footwear purchased:		
Casuals	31.6	30.3
Dress	21.0	22.2
Sandals/thongs	4.5	2.7
Clogs	0.3	0.3
Jogging shoes	9.5	9.3
Tennis shoes	10.9	9.9
Formal evening	1.9	2.4
Moccasin-type shoes	6.2	5.0
Slippers	1.9	0.7
Boots	11.6	16.6
Other	0.6	3.3

Source: Seventeen's Back-To-School Study, 1985.

FAIRCHILD FACT FILES CURRENTLY AVAILABLE

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is prewented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now--1985 Edition will be available in February, 1986)

DEPARTMENT STORE SALES: (Including selected major apparel specialty store sales) Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1984 Edition available now--1985 Edition will be available in January, 1986)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRICAL HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (Includes a new consumer buying intention survey) (October)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: (Including Tailored Casual Wear) Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (November)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and physical fitness.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons are made with findings in the last previous census, covering operations in 1977. (December)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (August)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.79-4

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

Major Appliances
and
Electrical Housewares

Including a New Consumer Buying Intention Survey

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director

Kenneth Greenman, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

TABLE OF CONTENTS

MAJOR APPLIANCES & ELECTRIC APPLIANCES

Page

MARKET TRENDS.......... 1
GENERAL INDUSTRY STATISTICS.......... 2
  EMPLOYMENT & EARNINGS.......... 7
  CONCENTRATION IN THE INDUSTRY.......... 8
  LOCATION OF THE INDUSTRY.......... 9

MAJOR APPLIANCES

PRODUCT
SHIPMENTS.......... 9
FOREIGN TRADE..........18
PRODUCER PRICES..........20
CONTRACT MARKET..........21
OWNERSHIP..........23

ELECTRIC HOUSEWARES

GENERAL INDUSTRY STATISTICS..........24
  EMPLOYMENT & EARNINGS..........25
  CONCENTRATION IN THE INDUSTRY..........25
  LOCATION OF THE INDUSTRY..........25
PRODUCT SHIPMENTS..........26
FOREIGN TRADE..........30
TOP HOUSEWARES SUPPLIERS..........32

MAJOR APPLIANCES & ELECTRIC HOUSEWARES AT THE RETAIL LEVEL

THE POTENTIAL MARKET..........33
CONSUMER MARKET..........35
RETAIL SALES..........38
  BY OUTLET TYPE..........38
  BY AREA..........43
  MICROWAVE OVEN SALES..........44
CONSUMER PRICES..........45
RETAIL ADVERTISING..........45
CONSUMER BUYING HABITS..........46

SCHEDULE OF ADDITIONAL FACT FILES..........51

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publication sources are used in the reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1985 by Fairchild Publications
Division of Capital Cities Media, Inc.
All Rights Reserved.

Standard Book Number: 87005-528-3
Printed in the United States of America

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES

Market Trends

Consumers spent $24.3 billion on kitchen and other household appliances in 1984, an 11.2% increase for the year. These expenditures, as reported by the Bureau of Economic Analysis (U.S. Department of Commerce), encompass purchases of refrigerators and freezers, cooking ranges, dishwashers, laundry equipment, stoves, air conditioners, sewing machines, vacuum cleaners, and other appliances. Also included is the retail value of these products furnished in new privately-owned housing units acquired by consumers during the year.

The major appliance industry set an all-time record for unit sales to dealers in 1984, a feat that is proving difficult to top in 1985. Analysts anticipate a relatively modest gain for the year, with most analysts predicting growth of about 5%. Contributing to what may essentially be a "flat year" is a downturn in the contract market for major appliances, as housing starts fall. On the other hand, a generally favorable U.S. economy has provided consumers with more discretionary income.

Microwave ovens continue to be the biggest seller among appliances, but the explosive demand for them in 1984 seems to have tapered off in 1985. Sales this year are forecast to rise at a respectable level (Merchandising magazine forecasts a 19% gain), but their performance has to be a letdown, after the 54% gain in 1984, to 9.1 million units. Much of the category's growth has come from the under one-cubic-foot size, with strong sales appeal in the mass market.

More traditional major appliances such as refrigerators and freezers, washers and dryers, and air conditioners also attained high sales levels in 1984, but again, 1985 is a new challenge. A weakening of the housing market in mid-1985, the duration of which is not yet known, has lowered expectations for sales of these products this year, reflecting the importance of the contract market for major appliance manufacturers. The industry is pinning its hopes on the huge potential of the replacement market, as consumers purchase new models to replace the units they bought in the early 1970's.

These new models contain technological advances which should inspire consumers to replace outmoded appliances. Refrigerators, for example, now have the capacity to make ice cream. Manufacturers are anticipating a favorable reaction to the new electronic controls that they are putting on their products which, among other things, alert users when--and how--their appliances are malfunctioning. The trend toward higher efficiency air conditioning units will continue in 1985.

The electric housewares market has also been galvanized by the introduction of new technologies that have stimulated replacement sales. The National Housewares Manufacturers Association reports that much of 1984's growth was generated by increased unit movement; two-thirds of all manufacturers did not raise their prices during the year.

The success of "smart" irons--those capable of turning themselves off--helped that product category to a 20% sales gain in 1984. Sales of new rechargeable kitchen tools, including cordless can openers, irons, blenders and electric knives, are being closely watched by the industry to determine whether they represent a new phase in appliances. Another notable performer in 1984 were sales of under-the-cabinet appliances, particularly coffee makers. Sources believe that these space-saving products will attain a total share of about 10%.

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

The U.S. Bureau of the Census has recently issued the final 1982 census of manufactures report in the Industry Series. Conduced every five years, census findings detail manufacturing activity in the major appliances and electric housewares industry. All dollar figures included in this report are at current prices for the year specified and, therefore, are unadjusted for changes in price levels. The inflation that has occurred over the 1977-1982 period should be taken into consideration when making comparisons.

Industry shipments of household appliances rose 18.0% over the five year period, despite a 5.9% drop in the number of production companies. New capital expenditures have soared, a trend that has continued into the mid-1980's as the industry has embarked on its biggest spending binge in years. In 1984, the six largest producers spent a total of $323 million for new plant and equipment, up 60% for the year.

	1982	1977	% Change 1982/1977
Household Appliances (SIC 363*) (includes electric housewares)			
Number of companies	528	561	- 5.9%
Number of establishments, total**	631	667	- 5.4
Number with 20 or more employees	335	343	- 2.3
Employees, total (thous.)	129.4	162.2	-20.2
Production workers (thous.)	98.1	128.7	-23.8
Payroll (mil. $)	$2,223.2	$1,898.5	+17.1
Value added by manufacture# (mil. $)	5,802.5	5,277.8	+ 9.9
Value of industry shipments## (mil. $)	12,670.9	10,741.0	+18.0
Capital expenditures, new (mil. $)	305.0	207.2	+47.2
Household Cooking Equipment (SIC 3631*)			
Number of companies	71	84	-15.5%
Number of establishments, total**	88	96	- 8.3
Number with 20 or more employees	59	58	+ 1.7
Employees, total (thous.)	23.7	25.4	- 6.7
Production workers (thous.)	17.0	19.1	-11.0
Payroll (mil. $)	$ 402.1	$ 289.1	+39.1
Value added by manufacture# (mil. $)	941.4	784.1	+20.1
Value of industry shipments## (mil. $)	2,414.9	1,707.2	+41.5
Capital expenditures, new (mil. $)	51.5	36.1	+42.7
Household Refrigerators, Freezers (3632*)			
Number of companies	39	33	+18.2%
Number of establishments, total**	50	42	+19.0
Number with 20 or more employees	30	25	+20.0
Employees, total (thous.)	22.4	35.8	-37.4
Production workers (thous.)	18.4	29.8	-38.3
Payroll (mil. $)	$ 441.2	$ 468.6	- 5.8
Value added by manufacture# (mil. $)	1,032.2	1,166.1	-11.5
Value of industry shipments## (mil. $)	2,470.7	2,576.6	- 4.1
Capital expenditures, new (mil. $)	79.1	46.9	+68.7

(continued)

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

	1982	1977	% Change 1982/1977
Household Laundry Equipment (SIC 3633*)			
Number of companies	15	21	-28.6%
Number of establishments, total**	25	31	-19.4
Number with 20 or more employees	20	24	-16.7
Employees, total (thous.)	16.5	19.4	-14.9
Production workers (thous.)	13.4	15.9	-15.7
Payroll (mil. $)	$ 335.4	$ 262.4	+27.8
Value added by manufacture# (mil. $)	984.1	844.7	+16.5
Value of industry shipments## (mil. $)	2,122.2	1,792.8	+18.4
Capital expenditures, new (mil. $)	35.1	27.3	+28.6
Household Vacuum Cleaners (SIC 3635*)			
Number of companies	29	33	-12.1%
Number of establishments, total**	31	36	-13.9
Number with 20 or more employees	18	23	-21.7
Employees, total (thous.)	8.4	10.4	-19.2
Production workers (thous.)	5.2	7.4	-29.7
Payroll (mil. $)	$ 151.1	$ 117.1	+29.0
Value added by manufacture# (mil. $)	463.6	380.4	+21.9
Value of industry shipments## (mil. $)	775.7	644.3	+20.4
Capital expenditures, new (mil. $)	17.1	16.4	+ 4.3
Sewing Machines (SIC 3636*)			
Number of companies	86	86	--
Number of establishments, total**	91	91	--
Number with 20 or more employees	25	25	--
Employees, total (thous.)	5.5	8.2	-32.9%
Production workers (thous.)	3.4	6.1	-44.3
Payroll (mil. $)	$ 101.9	$ 107.0	- 4.8
Value added by manufacture# (mil. $)	168.8	208.9	-19.2
Value of industry shipments## (mil. $)	299.7	304.9	- 1.7
Capital expenditures, new (mil. $)	8.6	8.1	+ 6.2
Household Appliances, n.e.c. (SIC 3639*)			
Number of companies	70	65	+ 7.7%
Number of establishments, total**	83	80	+ 3.8
Number with 20 or more employees	49	40	+22.5
Employees, total (thous.)	14.2	15.7	- 9.6
Production workers (thous.)	11.4	12.8	-10.9
Payroll (mil. $)	$ 252.4	$ 195.6	+29.0
Value added by manufacture# (mil. $)	673.8	527.9	+27.6
Value of industry shipments## (mil. $)	1,432.0	1,184.0	+20.9
Capital expenditures, new (mil. $)	40.6	24.6	+65.0

(footnotes continued)

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

(footnotes continued)

n.e.c. not elsewhere classified.

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 363 is the composite identifier for the appliance/electric housewares industry. Included in this category is the electric housewares industry (SIC 3634) which is separately covered in this Fact File in the section on electric housewares and personal care appliances.

SIC 3631 comprises equipment primarily engaged in manufacturing household cooking equipment, such as stoves, ranges and ovens, including both electric and non-electric types. Also included in this category are barbeque grills and microwave ovens.

SIC 3632 includes establishments primarily engaged in producing household refrigerators and home and farm freezers.

SIC 3633 includes establishments primarily engaged in manufacturing laundry equipment such as washing machines, wringers, dryers, and irons for household use. This industry also includes producers of coin-operated washers and driers.

SIC 3635 includes establishments primarily engaged in producing vacuum cleaners for household use.

SIC 3636 includes establishments primarily engaged in manufacturing sewing machines for domestic and industrial use.

SIC 3639 includes establishments primarily engaged in manufacturing household appliances, not elsewhere classified, such as water heaters, dishwashers and food waste disposal units. This industry also includes producers of dishwashing machines, floor waxes and polishers.

** Each business location is counted as a separate establishment.

‡ Value added by manufacture is derived by subtracting the total cost of materials (including supplies, fuel, electric energy, cost of resales and miscellaneous receipts) from the value of shipments (including resales) and other receipts, and adjusting the resulting amount by the net change in finished products and work-in-process inventories between the beginning and the end of the year.

‡‡ Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. It includes receipts for contract work, all items made by, or for, each establishment from materials owned by it, and also miscellaneous receipts. It also includes both primary and secondary products made in these industries. The value of shipments of appliances, only, by all producers, including manufacturers making them as secondary products, (described as PRODUCT SHIPMENTS as opposed to INDUSTRY SHIPMENTS) is covered on pages 9-17.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Industry Series, MC82-I-36B.

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

Industry Trends 1977-1984

The International Trade Administration (U.S. Department of Commerce) measures industry trends in both current and constant dollars. A constant dollar basis removes the effects of inflation and shows that, in terms of industry shipments, the household appliance industry had difficulties during the 1981-82 recession. Estimates of growth in 1983 and 1984 reflect the improved state of the U.S. economy as well as the continual capital spending by the industry, even during the recession.

Household Appliances Industry--Value of Industry Shipments, 1977-1984

(All values in millions of dollars)

	Historical Trends						Estimates		Compound Annual Growth Rate	% Change
	1977	1978	1979	1980	1981	1982	1983	1984	1977-1982	1984/1983
Household Appliances (SIC 363)										
Current dollar value	$10,737	11,488	12,741	12,936	13,108	12,662	14,780	16,648	+ 3.4%	+12.6%
Constant (1972 $) value	8,014	8,129	8,556	8,003	7,569	6,922	7,737	8,530	- 2.9	+10.2
Household Cooking Equipment (SIC 3631)										
Current dollar value	$ 1,707	1,912	2,353	2,466	2,526	2,418	3,061	3,536	+ 7.2	+15.5
Constant (1972 $) value	$ 1,209	1,298	1,519	1,461	1,421	1,295	1,532	1,730	+ 1.4	+12.9
Household Refrigerators, Freezers (SIC 3632)										
Current dollar value	$ 2,577	2,773	2,684	2,460	2,703	2,456	3,026	3,059	- 1.0	+16.0
Constant (1972 $) value	$ 1,848	1,897	1,775	1,527	1,526	1,276	1,512	1,700	- 7.1	+12.4
Household Laundry Equipment (SIC 3633)										
Current dollar value	$1,793	1,946	2,215	2,142	2,259	2,105	2,581	2,891	+ 3.3	+12.0
Constant (1972 $) value)	$1,280	1,332	1,434	1,277	1,256	1,093	1,315	1,450	- 3.1	+10.3
Household Vacuum Cleaners (SIC 3635)										
Current dollar value	$ 640	683	796	754	770	782	848	937	+ 4.1	+10.4
Constant (1972 $) value	$ 516	523	586	507	500	487	513	555	- 1.2	+ 8.2
Sewing Machines (SIC 3636)										
Current dollar value	$ 305	324	399	403	310	293	318	350	- 0.8	+10.1
Constant (1972 $) value	$ 201	198	223	211	143	129	138	150	- 8.6	+ 8.7
Household Appliances, n.e.c. (SIC 3639)										
Current dollar value	$1,184	1,268	1,425	1,411	1,462	1,449	1,781	2,073	+ 4.1	+16.4
Constant (1972 $) value	$ 871	897	951	858	837	775	915	1,035	- 2.3	+13.1

Source: U.S. Department of Commerce,
International Trade Administration,
1985 U.S. Industrial Outlook.

GENERAL INDUSTRY STATISTICS: MAJOR APPLIANCES & ELECTRIC HOUSEWARES

Employment & Earnings

Current information on employment and earnings in the major appliance and electric housewares industry is supplied by the U.S. Bureau of Labor Statistics. Their figures show the extent of the industry's recovery from the 1981-82 recession. Total employment in 1984 rose 7.5% for the year, led by the 15.2% annual gain in the refrigerator and freezer segment.

Employment & Earnings in the Major Appliance & Electric Housewares Industry

	August Monthly Averages			Annual Averages		
	1985(p)	1984	% Change 1985/84	1984	1983	% Change 1984/1983
Household Appliances (SIC 363) (includes Electric Housewares)						
All employees (thous.)	143.8	146.2	- 1.6%	149.8	139.4	+ 7.5%
Production workers (thous.)	112.5	115.3	- 2.4	118.5	108.5	+ 9.2
Avg. weekly earnings	$375.60	$357.90	+ 4.9	$360.10	$343.60	+ 4.8
Avg. hourly earnings	$ 9.32	$ 8.97	+ 3.9	$ 8.98	$ 8.59	+ 4.5
Avg. weekly hours	40.3	39.9	- 1.0	40.1	40.0	+ 0.3
Household refrigerators & freezers (SIC 3632)						
All employees (thous.)	29.0	26.3	- 10.3%	31.0	26.9	+ 15.2%
Production workers (thous.)	22.5	20.2	+ 11.4	24.9	21.4	+ 16.4
Avg. weekly earnings	$425.58	$434.08	- 2.0	$416.56	$401.96	+ 3.6
Avg. hourly earnings	$ 10.38	$ 10.36	+ 0.2	$ 10.26	$ 9.78	+ 4.9
Avg. weekly hours	41.0	41.9	- 2.1	40.6	41.1	- 1.2
Household laundry equipment (SIC 3633)						
All employees (thous.)	22.2	22.0	+ 0.9%	21.0	19.4	+ 8.2%
Production workers (thous.)	17.3	17.1	+ 1.2	16.4	15.0	+ 9.3
Avg. weekly earnings	$433.88	$416.97	+ 4.1	$426.12	$403.20	+ 5.7
Avg. hourly earnings	$ 10.82	$ 10.61	+ 2.0	$ 10.60	$ 10.08	+ 5.2
Avg. weekly hours	40.1	39.3	+ 2.0	40.2	40.0	+ 0.5

(p) preliminary

NOTE: BLS data on employment totals differs from Census Bureau data due to a difference in methodology in computing the figures. Separate employment and earnings statistics for the electric housewares industry only is covered in the Electric Housewares section of this Fact File.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Concentration in the Industry

The Household Appliance Industry (SIC 363)
By Employment Size, 1982
(Includes only establishments with payrolls)

	Household Appliances (SIC 363)		Household Cooking Equipment (SIC 3631)		Household Refrigerators & Freezers (SIC 3632)		Household Laundry Equipment (SIC 3633)	
	Number	% of Total	Number	% of Total	Number	% of Total	Number	% of Total
Total plants	589	100.0%	72	100.0%	48	100.0%	27	100.0%
Number by employment size:								
Under 20 employees	253	42.9	21	29.2	18	37.5	5	18.5
20-99 employees	138	23.4	12	16.7	12	25.0	6	22.2
100-499 employees	117	19.9	21	29.2	8	16.7	6	22.2
500 or more employees	81	13.8	18	25.0	10	20.8	10	37.0

	Household Vacuum Cleaners (SIC 3635)		Sewing Machines (SIC 3636)		Household Appliances n.e.c. (SIC 3639)	
	Number	% of Total	Number	% of Total	Number	% of Total
Total plants	33	100.0%	83	100.0%	83	100.0%
number by employment size:						
Under 20 employees	11	33.3	59	71.1	28	33.7
20-99 employees	11	33.3	14	16.9	30	36.1
100-499 employees	7	21.2	7	8.4	14	16.9
500 or more employees	4	12.1	3	3.6	11	13.3

n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census, *County Business Patterns 1982.*

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading States in Specified Major Appliance Industries, 1982

	Establishments		Value of Industry Shipments (Mil. $)
	Total	No. With 20+ Employees	
Household cooking equipment (SIC 3631*), total	88	59	$2,414.9
Leading states:			
Tennessee	17	14	na
Illinois	11	10	260.9
Sewing machines (SIC 3636*) total	91	25	299.7
Leading states:			
New York	38	9	29.8
Connecticut	4	2	8.9
Household appliances, n.e.c. (SIC 3639*), total	83	49	1,432.0
Leading states:			
California	16	7	126.3
Ohio	6	4	54.1

* For a definition of these SIC codes, see page 4.
na = not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
Industry Series, MC82-I-36B.

MAJOR APPLIANCE PRODUCT SHIPMENTS

Statistics provided by the Association of Home Appliance Manufacturers and the Association of Gas Appliance Manufacturers indicate that unit shipments of major home appliances rose 6.4% during the first seven months of 1985 against the comparable 1984 level. The bulk of this increase is due to the proliferation of microwave oven/range shipments, which soared 32% during the period to more than 6 million units. In fact, if microwave shipments were excluded from the total, then the rate of increase during the January-July 1985 period would be only 0.3% higher than last year.

Unit Shipments of Major Home Appliances,
January-July 1984, 1985
(Thousands of units)

	January-July		% Change
	1985	1984	1985/84
Total shipments*	25,091.1	23,572.9	+ 6.4%
Room air conditioners	2,762.2	2,815.4	- 1.9
Dehumidifiers	547.3	528.6	+ 3.5

(continued)

Unit Shipments of Major Home Appliances, January-July 1984, 1985
(Thousands of units)
(continued)

	January-July		% Change
	1985	1984	1985/84
Dishwashers	2,028.5	2,017.9	+ 0.5%
Built-in	1,887.3	1,882.6	+ 0.2
Portable	141.2	135.3	+ 4.4
Disposers	2,385.4	2,347.3	+ 1.6
Compactors	99.6	102.1	- 2.4
Refrigerators	3,593.1	3,669.5	- 2.1
Freezers	755.5	804.8	- 6.1
Upright	362.3	383.4	- 5.5
Chest	393.2	421.4	- 6.7
Electric ranges	1,758.9	1,789.9	- 1.7
Free standing	1,432.7	1,441.9	- 0.6
Built-in	326.2	348.1	- 6.3
Gas ranges	974.7	962.9	+ 1.2
Free standing	852.3	--	--
Built-in	56.8	61.0	- 6.9
Microwave ovens/ranges**	6,041.1	4,577.0	+ 32.0
Clothes washers, automatic	3,055.4	2,971.1	+ 2.8
Clothes dryers	2,182.2	2,079.9	+ 4.9
Electric	1,725.1	1,660.4	+ 3.9
Gas	457.1	419.4	+ 9.0
Water heaters	4,042.3	4,203.1	- 3.8
Electric	1,991.8	2,093.8	- 4.9
Gas	2,050.5	2,109.3	- 2.8

* Individual categories will not add to the total because of overlapping product categories.

** Includes imported microwave ovens and combination microwave ovens/ranges.

Source: Association of Home Appliance Manufacturers and the Association of Gas Appliance Manufacturers (August 1985).

The International Trade Administration has estimated the value of household appliance shipments at $15.6 billion for 1984, a 12.7% current dollar increase over 1983. Measured in constant dollars, (eliminating the effects of inflation), shipments are forecast to rise 3.8% during 1985. These figures are product shipments as opposed to industry, and, therefore, cover the value of specified products by all producers, regardless of whether the producer is primarily classified as a household appliance manufacturer.

MAJOR APPLIANCE PRODUCT SHIPMENTS

Estimated Value of Household Appliances Shipped by All U.S. Producers, In Current Dollars, 1983, 1984 & Constant Dollar 1985 Projections

(Value in millions of dollars)

Products	Current $ 1984(e)	Current $ 1983(e)	Constant (1972) $ % Change in Shipment Value 1985/1984	Constant (1972) $ Compound Annual Growth Rate 1972-1982
Household appliances, total*	$15,571	$13,812	+ 3.8%	- 0.2%
Household cooking equipment	3,434	2,972	+ 6.0	+ 2.0
Household refrigerators, freezers	3,090	2,666	+ 3.5	- 2.3
Household laundry equipment	2,439	2,176	+ 3.0	- 3.3
Vacuum cleaners	1,071	969	+ 4.1	+ 2.4
Sewing machines	266	242	+ 4.4	- 4.3
Household appliances, n.e.c.	2,263	1,947	+ 3.1	+ 0.4

n.e.c. not elsewhere classified; includes dishwashers, water heaters, trash compactors, etc.

(e) estimated

Source: U.S. Department of Commerce,
International Trade Administration,
1985 U.S. Industrial Outlook.

Detailed data on shipments of major household appliances is contained in the Current Industrial Reports, compiled by the U.S. Bureau of the Census. Virtually all known manufacturers approximately 113 major appliance companies are surveyed for these annual reports.

The detailed nature of the Current Industrial Reports provides insignts into the specific trends in different product categories. For example, production of larger household refrigerators gained market share in 1984 at the expense of smaller models. One explanation for this is the fact that not as many low-cost housing projects are being undertaken as in the past, limiting the need by builders for 11 and 12 cubic-foot models.

MAJOR APPLICANCE PRODUCT SHIPMENTS

Quantity & Value of Shipments by All Producers of Major Household Appliances, 1983, 1984

	Total Number of Companies	Quantity (Thous. Units)		Value (Mil. $)		
	1984	1984	1983	1984	1983	% Change 1984/83
Electric ranges, ovens and surface cooking units, including parts	28	8,959.1	7,212.8	$2,342.7	$2,016.5	+16.2%
Free standing ranges:						
Under 23", including apartment house type	8	121.4	123.6	21.4	21.6	- 0.9
23" to 32":						
Low oven, including slide-ins	11	2,227.4	1,814.5	612.7	486.3	+26.0
High ovens	2	48.7	52.9	26.7	29.3	- 8.9
High-low ovens	7					
33" and over	4	35.2	30.7	13.0	11.6	+12.1
Built-in ovens:						
Single oven	12	264.1	290.9	77.7	88.6	-12.3
Two oven	9	58.2	53.1	35.3	31.9	+10.7
Surface cooking tops	11	342.9	355.4	63.3	61.7	+ 2.6
Drop-in ranges	8	223.2	262.5	70.7	90.6	-22.0
Microwave ranges and ovens, excluding portables	9	161.7	155.4	134.2	128.6	+ 4.4
Microwave ovens, portable	13	5,401.1	4,002.9	1,117.5	915.5	+22.1
Gas household ranges, ovens and surface cooking units, including parts	22	1,892.5	1,697.1	542.1	491.6	+10.3
Standard type, free-standing:						
Over 32" cooking top & oven	7	77.0	82.4	25.6	27.2	- 5.9
Over 24" to 32" cooking top & oven	9	1,120.4	997.8	313.4	273.5	+14.6
Apartment ranges, 24" cooking top and under	7	181.9	173.5	32.6	32.1	+ 1.6
Standard type, for built-in installation	9	120.8	85.9	31.3	28.8	+ 8.7
Surface cooking tops	9	131.5	111.5	25.7	17.8	+44.4
Nonstandard types:						
Wall-hung	3	6.6	4.9	2.0	1.4	+42.9
Slide-in or drop-in	6	194.1	186.2	45.4	41.6	+ 9.1
Hot plates	1	60.2	54.9	38.6	34.9	+10.6
Gas household ranges, ovens and units, n.e.c.	6					

(continued)

MAJOR APPLICANCE PRODUCT SHIPMENTS

Quantity & Value of Shipments by All Producers of Major Household Appliances, 1983, 1984
(continued)

	Total Number of Companies 1984	Quantity (Thous. Units) 1984	Quantity (Thous. Units) 1983	Value (Mil. $) 1984	Value (Mil. $) 1983	% Change 1984/83
Other household ranges and cooking equipment (excluding gas and electric) and outdoor parts and accessories	38	10,102.4	9,550.9	$ 465.8	$ 401.9	+15.9%
Barbecuers, grills, etc., for outdoor cooking:						
Permanently installed units	na	181.5	209.1	7.7	9.2	-16.3
Portable units:						
Solid fuel (charcoal,etc.)	16	6,027.8	6,095.4	96.7	89.2	+ 8.4
Gasoline, white gas, kerosene type	4	471.0	454.3	17.9	14.2	+26.1
Other fuel (propane, etc.)	21	3,422.1	2,792.1	307.0	254.3	+20.7
Household refrigerators, including refrigerator-freezer combinations	16	6,316.5	5,702.3	2,573.4	2,249.3	+14.4
Complete units:						
9.4 cubic ft. and under	na	398.7	407.1	72.5	69.8	+ 3.9
9.5 to 12.4 cubic ft.	na	327.2	381.5	92.9	99.2	- 6.4
12.5 to 14.4 cubic ft.	na	998.3	902.9	298.6	269.2	+10.9
14.5 to 17.4 cubic ft.	na	1,732.9	1,674.4	628.4	615.1	+ 2.2
17.5 to 19.4 cubic ft.	na	1,416.2	1,055.3	584.3	441.1	+32.5
19.5 cubic ft. and larger	6	1,409.8	1,248.6	876.0	735.6	+19.1
Range-refrigerator and/or sink combinations	4	33.4	32.5	20.7	19.3	+ 7.3
Food freezers, complete units, household type	10	1,162.0	1,261.8	279.1	305.5	- 8.6
10.4 cubic ft. & under	na	319.5	381.7	58.3	70.7	-17.5
10.5 to 17.4 cubic ft.	na	530.8	537.0	126.8	130.1	- 2.5
17.5 to 21.4 cubic ft.	na	232.0	257.8	69.4	78.1	-11.1
21.5 cubic ft. & larger	na	79.7	85.3	24.6	26.6	- 7.5
Household mechanical washing machines, dryers & washer-dryer combinations	8	8,760.6	8,019.0	2,078.9	1,876.2	+10.8
Washing machines, mechanical, including those with dishwasher attachments:						
Standard size, electrically driven, automatic and semiautomatic, excluding coin-operated	6	5,005.5	4,614.8	1,318.2	1,201.7	+ 9.7
Dryers, mechanical:						
Gas	6	764.9	681.4	171.7	151.5	+13.3
Electric	7	2,882.7	2,619.4	548.4	489.1	+12.1

(continued)

Quantity & Value of Shipments by All Producers of Major Household Appliances, 1983, 1984
(continued)

	Total Number of Companies	Quantity (Thous. Units)		Value (Mil. $)		
	1984	1984	1983	1984	1983	% Change 1984/83
Household dishwashing machines, food waste disposers, floor waxing machines and trash compactors	22	na	na	$1,023.7	$ 885.3	+15.6%
Dishwashing machines:						
Portable, including convertible type	6	270.0	354.3	64.7	80.5	-19.6
Built-in type	7	3,159.9	2,785.1	695.2	574.6	+21.0
Floorwaxing, polishing, scrubbing & shampooing machines (for household use only)	4	396.8	332.0	26.5	21.8	+21.6
Food waste disposers	6	3,947.4	3,373.5	172.9	149.0	+16.0
Household trash compactors	6	179.3	158.3	39.8	35.6	+11.8
Water heaters, electric	14	3,829.5	3,373.9	397.8	331.0	+20.2
Storage type:						
44 gallons & under	22	2,272.6	1,988.3	218.7	183.9	+18.9
45 to 54 gallons	9	1,100.3	980.5	119.0	100.4	+18.5
55 gallons and over, and all other types, including circulating and portable storage	na	456.6	405.1	60.2	46.7	+28.9

na not available
nec not elsewhere classified

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Major Household Appliances, MA-36F(84)-1.

In addition to the specific appliances covered in the preceding table, the Census Bureau issues Current Industrial Reports on other types of appliances including air conditioners/dehumidifiers and certain types of heaters, as reported in the following tables.

MAJOR APPLIANCE PRODUCT SHIPMENTS

Air Conditioners/Dehumidifiers

Quantity & Value of Shipments of Room Air Conditioners & Dehumidifiers by All U.S. Producers, 1982, 1983

	Quantity (Thous. Units)		% Change	Value (Mil. $)		% Change
	1983	1982(r)	1983/82	1983	1982(r)	1983/82
Room air conditioners, total	2,501.6	3,322.0	-24.7%	$632.0	$892.3	-29.2%
5,999 Btu/Hr. and under	454.4	635.0	-28.4	77.4	109.3	-29.2
6,000-6,999 Btu/hr.	80.4	115.3	-30.3	18.5	25.5	-27.5
7,000-7,999 Btu/hr.	146.7	241.1	-39.2	34.3	55.4	-38.1
8,000-8,999 Btu/hr.	151.4	136.4	+11.0	39.5	34.3	+15.2
9,000-9,999 Btu/hr.	134.6	173.0	-22.2	38.0	49.2	-22.8
10,000-12,999 Btu/hr.	390.1	501.9	-22.3	115.1	148.4	-22.4
13,000-19,999 Btu/hr.	342.2	775.0	-55.8	125.3	264.8	-52.7
20,000 Btu/hr.	192.0	305.4	-37.1	88.6	134.3	-34.0
Electrically operated dehumidifiers, mechanically refrigerated, self-contained	610.2	438.8	+39.1	95.2	71.1	+33.9

(r) revised

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Air-Conditioning & Refrigeration Equipment
MA-35M(83)-1.

Heating Stoves

Quantity & Value of Shipments of Heating Stoves By All U.S. Producers, 1982, 1983

	Quantity (Thous. Units)		% Change	Value (Mil. $)		% Change
	1983	1982	1983/82	1983	1982	1983/82
Domestic heating stoves, total	1,177.3	1,305.8	- 9.8%	$289.2	$310.5	- 6.9%
Gas	174.5	192.4	- 9.3	28.0	28.9	- 3.1
Wood	737.5	742.9	- 0.7	227.9	246.5	- 7.5
Fireplaces	533.6	509.3	+ 4.8	175.6	191.4	- 8.3
Stoves	203.8	233.5	-12.7	52.3	55.2	- 5.3
Kerosene/Coal	265.3	370.5	-28.4	33.3	35.1	- 5.1
Air space heaters						
Portable room heaters	4,032.8	4,281.0	- 5.8	88.4	96.9	- 8.8
Fan-forced type	2,778.4	3,277.7	-15.2	54.3	68.8	-21.1
Other fan	1,254.4	1,003.3	+25.0	34.1	28.1	+21.4

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Selected Heating Equipment, MA34N(83)-1.

MAJOR APPLIANCE PRODUCT SHIPMENTS

Floor Care

Data from the 1983 annual survey of manufactures places the value of household vacuum cleaner shipments by all U.S. producers at slightly more than $1 billion. This is an increase of 11.8% in value from the nearly $906 million in shipments reported in the 1982 census of manufactures. Annual surveys are conducted by the U.S. Bureau of the Census in each of the years between censuses to provide a continuous series of basic industry statistics which are the basis for estimates on key measures of manufacturing activity. A survey by *Merchandising* magazine estimates a 9.2% increase in the unit movement of vacuum cleaners from 1983 to 1984, led by shipments of hand-held lightweight vacuums.

Value of Shipments of Vacuum Cleaners By All U.S. Producers, 1980-1983
(Millions of dollars)

1983	1982	1981	1980	% Change 1983/1980
$1,013.0	$905.8	$831.0	$817.1	+ 24.0%

Source: U.S. Bureau of the Census,
1983 Annual Survey of Manufactures,
Value of Product Shipments, M83(AS)-2.

Shipments of Floor Care Products, 1983 and 1984

	Quantity (Thous. Units)		% Change
	1984	1983	1984/1983
Vacuum cleaners, total	13,586	12,439	+ 9.2%
Cannister	3,066	2,948	+ 4.0
Upright	4,377	4,229	+ 3.5
Lightweight, total	6,143	5,262	+16.7
Hand-held	5,200	4,250	+22.4
Sticks	943	1,012	- 6.8
Carpet sweepers	1,798	1,712	+ 5.0
Floor polishers	211	210	+ 0.5

Source: *Merchandising* magazine,
63rd Annual Statistical &
Marketing Reports, 1984.

Value of Shipments of Sewing Machines By All U.S. Producers, 1980-1983
(Millions of dollars)

1983	1982	1981	1980	% Change 1983/1980
$212.3	$231.0	$241.1	$328.4	- 35.4%

Source: U.S. Bureau of the Census,
1983 Annual Survey of Manufactures,
Value of Product Shipments, M83(AS)-2.

MAJOR APPLIANCE PRODUCT SHIPMENTS

Concentration Levels

Manufacturers' Share of Total Shipment Value of Specified Major Appliances, 1982 & 1983

Electric Clothes Dryers	1983	1982
Whirlpool	47%	45%
General Electric/Hotpoint	17	18
Maytag	15	15
White Consolidated	15	15
All others	6	7

Freezers	1983	1982
Whirlpool	34%	33%
White Consolidated	30	29
Admiral	22	24
All others	14	14

Clothes Washers	1983	1982
Whirlpool	48%	45%
General Electric/Hotpoint	18	19
Maytag	15	16
White Consolidated	15	15
All others	4	5

Room Air Conditioners	1983	1982
General Electric	24%	22%
White	18	16
Whirlpool (Heil-Quaker)	12	10
Emerson Quiet Kool	7	5
Fedders	7	7
Carrier	6	6
Freidrich	5	6
All others	21	28

Electric Ranges/Ovens	1983	1982
General Electric/Hotpoint	32%	36%
White Consolidated	16	16
Whirlpool	12	10
Roper	10	6
Magic Chef	9	9
Raytheon	8	8
All others	13	15

Gas Clothes Dryers	1983	1982
Whirlpool	47%	45%
General Electric/Hotpoint	16	17
White Consolidated	15	15
All others	22	23

Refrigerators	1983	1982
General Electric/Hotpoint	31%	30%
Whirpool	30	29
White Consolidated	23	24
All others	16	17

Microwave Ovens	1983	1982
General Electric/Hotpoint	16%	15%
Sanyo	13	10
Litton	12	12
Raytheon (Amana, Caloric)	11	13
Sharp	11	12
Tappan	9	9
All others	28	29

Vacuum Cleaners	1983	1982
Hoover	40%	33%
NUE (Eureka)	21	30
Whirlpool (Sears)	16	9
General Signal (Iona, Regina)	10	7
Electrolux	8	13
All others	5	8

Gas Ranges/Ovens	1983	1982
Magic Chef	21%	21%
Raytheon	18	19
Tappan	17	19
Roper	14	12
Maytag (Hardwick, Jenn-Air)	10	--
All Others	20	29

Source: Appliance Manufacturer,
8th Annual Appliance Industry, Marketing Guide-1984
(All rights reserved).

FOREIGN TRADE IN MAJOR APPLIANCES

Imports

Appliance imports were estimated at $2.1 billion in 1984 by the International Trade Administration, up nearly 40% for the year. They accounted for 12.9% of domestic shipments in 1984, as compared with a 10.4% share of the market in 1983. Imports are forecast to reach $2.5 billion in 1985, a 16.3% gain.

A strong U.S. dollar during the mid-1980's has been a key contributor to this surge of appliance imports. Import penetration, however, is not uniform, as some product categories have been virtually untouched by foreign producers. Huge capital expenditure outlays by domestic manufacturers has severely limited the ability of imports to gain ground in the large appliance market. Imports are an important factor only in the sale of microwave ovens, accounting for 38% of unit shipments in 1983. Japan, Singapore and Korea are major suppliers in this area.

Exports

The export value of the following major appliance categories fell 10.0% for the year in 1984. Were it not for the explosive growth of microwave oven exports, the decline in value would have been almost 14%, and exports in units would have been virtually unchanged. The strength of the U.S. dollar overseas and the large international debts accumulated by developing countries have contributed to the stagnation of exports.

Quantity & Value of U.S. Exports of Specified Major Appliances, 1983 & 1984

	Quantity (Thous. Units)		% Change	Value* (Mil. $)		% Change
	1984	1983	1984/83	1984	1983	1984/83
Major appliances, total	2,486.0	2,404.7	+ 3.4%	$381.5	$424.0	-10.0%
Kitchen & related appliances, total	1,792.4	1,643.2	+ 9.1	228.0	238.2	- 4.3
Refrigerators and refrigerator-freezers, household-type, total	147.3	188.6	-21.9	80.8	100.9	-19.9
Under 13.5 cubic feet	35.5	52.1	-31.9	16.8	23.8	-29.4
Over 13.5 cubic feet	111.8	136.5	-18.1	64.0	77.1	-17.0
Freezers, household type	24.1	26.3	- 8.4	10.7	12.8	-16.4
Microwave ovens, household type	156.0	86.9	+79.5	34.8	21.6	+61.1
Household cooking apparatus, exc. portable, of base metal	86.2	121.7	-29.2	14.0	17.5	-20.0
Domestic heating stoves, of base metal	70.2	102.5	-31.5	6.6	9.1	-27.5
Electric cooking stoves and ranges, household type, nspf	46.3	55.6	-16.7	16.2	17.6	- 8.0

(continued)

Exports

Quantity & Value of U.S. Exports of Specified Major Appliances, 1983 & 1984 (continued)

	Quantity (Thous. Units) 1984	Quantity (Thous. Units) 1983	% Change 1984/83	Value* (Mil. $) 1984	Value* (Mil. $) 1983	% Change 1984/83
Nonportable cooking and food warming appliances, nspf	680.6	533.7	+27.5%	$ 27.5	$ 25.6	+ 7.4%
Nonportable electrothermic kitchen and household appliances, nspf	379.5	344.3	+10.2	11.5	9.0	+27.8
Dishwashers, household type	62.1	63.2	- 1.7	15.3	15.4	- 0.6
Food waste disposers, electro-mechanical	140.1	120.4	+ 16.4	10.6	8.7	+21.8
Laundry equipment, total	185.9	190.3	- 2.3	53.2	53.4	- 0.4
Washing machines, excluding commercial and industrial	132.8	142.7	- 6.9	39.1	41.8	- 6.5
Clothes dryers, household types	53.1	47.6	+ 11.6	14.1	11.6	+21.6
Air conditioners, window and wall types, total	126.2	227.2	- 44.5	46.1	81.9	-43.7
Under 10,000 Btu/hr.	31.2	46.8	- 33.3	11.0	16.0	-31.3
10,000-16,999 Btu/hr.	48.5	70.7	- 31.4	16.8	25.0	-32.8
17,000 Btu/hr. and over	46.5	109.7	- 57.6	18.3	40.9	-55.3
Vacuum cleaners, electro-mechanical	332.3	300.4	+ 10.6	33.4	32.4	+ 3.1
Floor polishers, electro-mechanical and parts thereof	na	na	--	14.1	11.1	+27.0
Gas water heaters	49.2	43.6	+ 12.8	6.7	7.0	- 4.3

na not available.
nspf not specially provided for.
* Value is equivalent to f.a.s. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. It excludes the cost of loading the merchandise aboard the carrier as well as freight, insurance and any other charges or transportation costs beyond the port of exportation.

Source: U.S. Dept. of Commerce, U.S. General Exports (FT 410), December, 1983, 1984.

FOREIGN TRADE

Import Penetration

Total Apparent Consumption of Selected Major Appliances in the U.S., 1984 & Imports' Share of the Total

	Apparent U.S. Consumption*		Imports % To Total Apparent U.S. Consumption	
	Quantity (Thous.)	Value (Mil. $)	Quantity	Value
Electric ranges and ovens, other than microwave	3,516.7	$1,148.0	7%	6%
Microwave ranges, ovens	9,877.4	1,822.9	45	33
Refrigerators and combination refrigerator-freezers	7,475.9	2,637.9	17	6
Food freezers, household type	1,234.2	294.9	8	8
Washing machines, household type	5,023.0	1,333.8	1	1

* Apparent consumption equals U.S. production less exports plus imports.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Major Household Appliances, 1984 (MA36F).

PRODUCER PRICES

Major appliance prices at the factory level rose moderately in 1984, an annual increase of 2.3%. This figure was in line with producer price gains for all commodities and for all household appliances. The price indexes for upright home freezers and vacuum cleaners declined for the year.

Producer (Factory) Price Indexes For Specified Major Appliances 1983, 1984 and June 1984 1985

(1967=100 unless otherwise indicated)

	June Monthly Average			Annual Averages		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
All commodities	309.5	311.4	- 0.6%	310.3	303.1	+ 2.4%
Household appliances	212.6	211.1	+ 0.7	211.0	206.9	+ 2.0
Major appliances	217.9	216.1	+ 0.8	216.1	211.3	+ 2.3
Cooking equipment	236.1	232.2	+ 1.7	232.6	226.2	+ 2.8
Free standing electric ranges	258.4	252.4	+ 2.4	252.6	241.9	+ 4.4
Built-in surface cooking tops, electric	236.1	230.4	+ 2.5	230.7	227.1	+ 1.6
Portable microwave ovens (12/78=100)	92.1	99.5	- 7.4	98.5	na	--
Drop-in electric ranges	na	116.2	--	116.4	113.8	+ 2.3
Free-standing gas ranges	286.6	262.2	+ 2.4	262.8	253.6	+ 3.6
Nonstandard type gas ranges (6/81=100)	124.7	120.8	+ 3.2	121.6	115.7	+ 5.1

(continued)

Producer (Factory) Price Indexes For Specified Major Appliances
1983, 1984 and June 1984, 1985
(1967=100 unless otherwise indicated)
(continued)

	June Monthly Average			Annual Averages		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Laundry equipment	220.5	218.1	+ 1.1%	218.6	213.4	+ 2.4%
Washing machines, automatic	209.6	207.2	+ 1.2	208.1	203.5	+ 2.3
Electric dryers	240.5	239.1	+ 0.6	238.7	232.5	+ 2.7
Refrigeration equipment	208.4	207.6	+ 0.4	207.6	203.4	+ 2.1
Refrigerator-freezer, 14.4 cubic feet and under (12/81=100)	110.6	110.2	+ 0.4	109.6	108.9	+ 0.6
Home freezer, upright type	193.7	203.5	- 4.8	204.9	205.6	- 0.3
Other major appliances	200.7	200.2	+ 0.2	198.8	195.4	+ 1.7
Room air conditioners	180.5	178.5	+ 1.1	176.4	174.5	+ 1.1
Dishwasher, undercounter	195.1	197.3	- 1.1	197.0	192.5	+ 2.3
Vacuum cleaners, including parts and attachments	172.2	167.5	+ 2.8	166.4	167.0	- 0.4

na not available.

Source: U.S. Bureau of Labor Statistics.

THE CONTRACT MARKET FOR MAJOR APPLIANCES

In 1984, nearly 95% of all new one-family homes came equipped with a stove, 90.5% had a dishwasher, and 22.2% contained a refrigerator. These figures reflect a trend toward more and more new houses being equipped with these appliances. In 1978, for example, only 84% came with dishwashers, and 11% with refrigerators.

The contract market for all three major appliances is strongest in the South, due to that region's clear dominance in new housing construction. However, in terms of the percent of new houses in each region that have these appliances, the West leads the way in stoves (98.8%) and dishwashers (95.6%), while the Northeast is the leader in refrigerators (34.0%). For the most part, the more expensive the house the greater the likelihood that it will contain major appliances.

Selected Appliances Included in the Sale Price of New One-Family Houses, by Region, 1983, 1984

	1984		1983	
	Number of Houses (Thous.)	% of Total	Number of Houses (Thous.)	% of Total
U.S. total	639	100.0%	623	100.0%
Appliances:				
Stove	606	94.8	586	94.1
Dishwasher	578	90.5	552	88.6
Refrigerator	142	22.2	130	20.9
Northeast, total	94	100.0	76	100.0
Appliances:				
Stove	89	94.7	70	92.1
Dishwasher	78	83.0	61	80.3
Refrigerator	32	34.0	24	31.6
Midwest, total	76	100.0%	71	100.0%
Appliances:				
Stove	58	76.3	51	71.8
Dishwasher	63	82.9	57	80.3
Refrigerator	16	21.1	13	18.3
South, total	309	100.0	323	100.0
Appliances:				
Stove	302	97.7	315	97.5
Dishwasher	283	91.6	295	91.3
Refrigerator	81	26.2	81	25.1
West, total	160	100.0	152	100.0
Appliances:				
Stove	158	98.8	149	98.0
Dishwasher	153	95.6	139	91.4
Refrigerator	14	8.8	13	8.6

Source: U.S. Bureau of the Census,
Characteristics of New Housing: 1984,
C25-84-13.

Selected Appliances Included in New One-Family Houses By Sales Price, 1984

	Percent of Houses Sold With:		
	Stoves	Dishwashers	Refrigerators
Sale price of house:			
Under $50,000	80.9%	59.6%	19.1%
$50,000-$59,999	92.0	78.7	24.0
$60,000-$79,999	95.0	91.5	22.1
$80,000-$99,999	96.0	96.0	21.4
$100,000-$119,999	96.5	96.5	21.1
$120,000 & over	98.5	97.1	23.5

(continued)

THE CONTRACT MARKET FOR MAJOR APPLIANCES

Selected Appliances Included in New One-Family Houses By Sales Price, 1984
(continued)

	Percent of Houses Sold With:		
	Stoves	Dishwashers	Refrigerators
Average price of house:			
With specified appliances	$99,000	$101,000	$100,600
Without specified appliance	70,800	64,900	96,600
Median price of house:			
With specified appliance	80,900	82,700	79,800
Without specified appliance	65,000	53,000	79,900

Source: U.S. Bureau of the Census,
Characteristics of New Housing: 1984,
C25-84-13.

In addition to the new-house market for major appliances, a large market also exists, of course, in motels, hospitals, schools and other institutions. This Fact File is, however, concerned with the household market for home appliances and does not cover these contract markets.

MAJOR APPLIANCE OWNERSHIP

Major Home Appliance Ownership in U.S. Households, 1982

	Number of Households (in millions)	% of Total
U.S. total	83.5	100.0%
Refrigerators	83.4	99.9
Washers	61.5	73.6
Dryers	54.6	65.3
Electric ranges	48.4	58.0
Disposers	41.5	49.7
Dishwashers	37.2	44.5
Freezers	35.7	42.8
Gas ranges	35.7	42.7
Room air conditioners	22.6	27.0
Microwave ovens	21.4	25.6
Dehumidifiers	9.2	11.0
Compactors	2.6	3.1

Source: Association of Home Appliance Manufacturers,
Major Appliance Industry Fact Book 1985.

GENERAL STATISTICS ON THE ELECTRIC HOUSEWARES INDUSTRY

As noted in the introductory section of this Fact File covering General Statistics on Major Appliances & Electric Housewares, industry data on a combined basis is reported by the Census Bureau and other government sources. However, separate figures for the electric housewares segment are covered in this section, where available.

The 1982 census of manufactures indicates the shipments by those manufacturers classified in the electric housewares and fans industry totaled $3.2 billion, a 24.7% increase in current dollars (not accounting for inflation) from the prior census five years earlier. Capital expenditures in the industry more than doubled.

Electric Housewares & Fans (SIC 3634*)

	1982	1977	% Change 1982/1977
Number of companies	218	239	- 8.8%
Number of establishments, total**	263	291	- 9.6
Number with 20 or more employees	134	148	- 9.5
Employees, total (thous.)	38.7	47.3	- 18.2
Production workers (thous.)	29.3	37.6	- 22.1
Payroll (mil. $)	$ 539.1	$ 458.7	+ 17.5
Value added by manufacture# (mil. $)	1,538.5	1,365.7	+ 12.7
Value of industry shipments## (mil. $)	3,155.7	2,531.2	+ 24.7
Capital expenditures, new (mil. $)	73.0	47.8	+ 52.7

* SIC 3634 includes establishments primarily engaged in manufacturing electric housewares for heating, cooking, and other purposes. Important products of this industry include electric air heaters, fans, electrically heated bed coverings, blenders, broilers, deep fat fryers, flat irons, food mixers, hot plates, percolators, coffee makers and roasters. Also included in this industry are personal care electrics: hair curlers, hair dryers, massage machines, electric razors, sauna heaters, electric toothbrushes and water pulsating devices.

** Each business location is counted as a separate establishment.

# Value added by manufacture is derived by subtracting the total cost of materials (including supplies, fuel, electric energy, cost of resales and miscellaneous receipts) from the value of shipments (including resales) and other receipts and adjusting the resulting amount by net change in finished products and work-in-process inventories between the beginning and end of year.

## Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. It includes receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It also includes both primary and secondary products made in the industry. Value of product shipments by all producers (including secondary manufacturers of electric housewares) is covered on pages 26-30.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Industry Series MC-82-I-36B.

GENERAL STATISTICS ON THE ELECTRIC HOUSEWARES INDUSTRY

Employment & Earnings

Employment & Earnings in the Electric Housewares & Fans Industry

	August Monthly Averages			Annual Averages		
	1985(p)	1984	% Change 1985/84	1984	1983	% Change 1984/83
Electric housewares & fans (SIC 3634)						
All employees (thous.)	36.8	40.4	- 8.9%	39.7	40.1	- 1.0%
Production workers (thous.)	28.4	31.5	- 9.8	30.7	30.5	+ 0.7
Average weekly earnings	$283.29	$264.32	+ 7.2	$270.36	$262.80	+ 2.9
Average hourly earnings	$ 7.10	$ 6.76	+ 5.0	$ 6.81	$ 6.67	+ 2.1
Average weekly hours	39.9	39.1	+ 2.0	39.7	39.4	+ 0.8

(p) preliminary.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

Concentration in the Industry

Number of Manufacturing Plants in the Electric Housewares & Fans Industry By Employment Size, 1982

(Includes only establishments with payrolls)

	Electric Housewares & Fans (SIC 3634)	
	Number	% of Total
Total plants	242	100.0%
Number by employment size		
Under 20 employees	110	45.5
20-99 employees	53	21.9
100-499 employees	54	22.3
500 or more employees	25	10.3

Source: U.S. Bureau of the Census, County Business Patterns 1982.

Location of the Industry

Leading States in the Electric Housewares Industry, 1982

	Establishments		Value of Industry Shipments (Mil. $)
	Total	No. with 20+ Employees	
Electric housewares & fans (SIC 3634), total			
Leading states:			
New York	25	12	$ 234.4
California	25	9	69.8
Ohio	12	6	284.5
Tennessee	11	9	363.8
Wisconsin	11	6	347.0
Pennsylvania	11	6	229.4

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Industry Series MC-82-I-36B.

ELECTRIC HOUSEWARES PRODUCT SHIPMENTS

Shipments of electric housewares and fans by all domestic producers was valued at nearly $2.9 billion based on data from the 1982 Annual Survey of Manufactures. This figure constitutes shipments by all producers of this merchandise, regardless of their industry classification. It is 1.8% higher than the value reported for 1982 but 6.4% lower than the level achieved in 1980 before the recession took hold.

Value of Shipments of Electric Housewares and Fans By All U.S. Producers, 1980-1983
(Millions of dollars)

	1983	1982	1981	1980	% Change 1983/1980
Electric housweares and fans, total	$2,895.8	$2,845.6	$2,874.1	$3,093.7	- 6.4%
Electric fans, excluding industrial type	558.1	592.3	648.7	700.6	-20.3
Small electric household appliances	2,043.6	1,977.3	1,997.8	2,135.9	- 4.3
Parts for small appliances	223.9	210.6	167.3	187.2	+19.6
Electric housewares & fans, n.s.k.	70.2	65.4	60.3	70.0	+ 0.3

n.s.k. not specified by kind.

Source: U.S. Bureau of the Census,
1983 Annual Survey of Manufactures,
Value of Product Shipments M83(AS)-2.

Detailed data on the production of electric housewares and fans is provided in the Current Industrial Reports pertaining to the industry. The Census Bureau has interviewed all known manufacturers of these products (approximately 125 companies) for the annual reports.

Quantity & Value of Shipments of Electric Housewares and Fans By Product, 1983, 1984

	No. of U.S. Producers	Quantity (Thous. Units)		Value (Mil. $)		% Change
	1984	1984	1983	1984	1983	1984/83
Electric housewares and fans total	125	--	--	$2,629.3	$2,528.4	+ 4.0%
Electric housewares, total (excluding parts)*	90	--	--	2,048.3	1,966.5	+ 4.2
Food preparation appliances:						
Broilers with or without rotisseries	8	527.5	793.2	19.3	29.5	-34.6
Automatic coffee makers, total	na	14,605.8	13,676.5	306.8	264.9	+15.8
Drip type	12	10,955.9	9,675.0	246.8	201.0	+22.8
Percolator or vacuum type	7	2,761.2	3,091.7	39.2	44.0	-10.9
Urn type	5	889.0	909.8	20.8	19.9	+ 4.5

(continued)

ELECTRIC HOUSEWARES PRODUCT SHIPMENTS

Quantity & Value of Shipments of Electric Housewares and Fans By Product, 1983, 1984

	No. of U.S. Producers	Quantity (Thous. Units)		Value (Mil. $)		% Change
	1984	1984	1983	1984	1983	1984/83
Food preparation appliances: (cont'd.)						
Deep fat fryers	8	1,657.9	1,758.1	$ 20.0	20.6	- 2.9%
Ovens and roasters, with or without broilers	9	3,473.6	2,982.6	151.0	124.3	+21.5
Hot plates and disc stoves (1,650 watts or less)	10	1,326.3	1,325.9	18.4	17.8	+ 3.4
Automatic toasters	7	7,894.9	6,467.8	100.4	88.7	+13.2
Waffle irons, sandwich grills, griddles and combinations	13	1,719.2	1,401.0	39.6	33.0	+20.0
Frying pans (skillets)	9	3,016.4	3,225.1	63.6	73.6	-13.6
Corn poppers, total	na	3,637.9	3,413.8	41.8	41.3	+ 1.2
Hot-air type	4	2,715.4	2,441.2	30.7	29.8	+ 3.0
Other than hot-air type	7	922.5	972.6	11.1	11.5	- 3.5
Household food processors	7	1,658.2	1,800.4	66.2	79.5	-16.7
Household food mixers, total	na	8,470.6	8,022.3	216.9	232.8	- 6.8
Hand (portable)	7	3,183.0	2,514.0	34.4	29.8	+15.4
Stand type	4	1,212.6	1,441.0	93.3	114.9	-18.8
Blenders (liquefiers) Ice crushers	4 4	4,075.1	4,067.3	89.2	88.0	+1.4
Household food preparation appliances, except mixers	13	1,363.8	2,414.5	31.8	54.1	-41.2
Can openers	8	5,880.0	4,833.2	72.4	60.2	+20.3
Electric irons, standard household types	na	8,219.4	7,279.3	111.5	95.6	+16.6
Electric blankets	3	4,939.9	4,735.0	128.6	122.0	+ 5.4
Electric heating pads	8	3,816.1	3,926.2	29.8	29.0	+ 2.8
Hair dryers	na	567.0	882.8	5.4	12.7	- 57.5
Other small electric appliances, including curling irons, vibrators, portable dehumidifiers	32	na	na	135.8	160.4	-15.3
Portable humidifiers	10	2,978.2	2,877.4	31.1	34.2	- 9.1
Air space heaters, total	na	8,665.4	7,312.2	205.7	174.1	+18.2
Portable room heaters:						
Fan forced type	16	3,743.7	2,778.4	75.0	54.3	+38.1
Other than fan forced (convector, radiant)	14	1,132.0	1,094.4	27.6	26.0	+ 6.2
For fixed installations, all types:						
Baseboard, except glass panel	13	2,375.6	2,075.1	49.7	44.3	+12.2
Other than baseboard	14	1,414.0	1,364.3	53.4	49.5	+ 7.9

(continued)

ELECTRIC HOUSEWARES PRODUCT SHIPMENTS

Quantity & Value of Shipments of Electric Housewares and Fans By Product, 1983, 1984
(continued)

	No. of U.S. Producers	Quantity (Thous. Units)		Value (Mil. $)		% Change
	1984	1984	1983	1984	1983	1984/83
Electric fans, except industrial	35	22,845.9	21,313.9	$581.0	$561.9	+ 3.4%
Desk & wall bracket	na	4,857.2	5,388.3	76.7	83.9	- 8.6
Window (household) permanent type	na	462.4	483.1	13.0	14.0	- 7.1
Portable window fans	7	7,102.9	5,449.6	110.1	82.0	+32.7
Roll abouts	2					
Electric range hoods, total	na	2,431.7	2,047.2	96.7	81.9	+18.1
Ducted	13	1,156.0	1,045.6	56.7	50.4	+12.5
Nonducted	11	1,275.6	1,001.7	40.0	31.5	+27.0
Oven hoods	3	96.7	94.1	6.0	5.4	+11.1
Ceiling fans	15	5,510.1	5,686.1	225.5	250.5	-10.0
All other household type ventilating and exhaust fans	4	2,3850	2,165.5	53.1	43.3	+22.6
All other electric fans	5					

* Includes electric housewares not separately reported, such as shavers, knives, toothbrushes, etc.
na not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Electric Housewares & Fans, MA36E(84)-1.

Concentration Levels

Manufacturers' Share of Total Shipment Value of Specified Electric Housewares, 1982 & 1983

	1983	1982
Blenders		
Sunbeam (Northern Electric, Oster)	42%	40%
Scovill (Hamilton Beach)	29	30
Dynamics Corp. (Waring)	23	24
All others	6	6
Drip Coffee Makers		
North American Systems (Mr. Coffee)	26%	39%
North American Philips (Norelco)	22	21
General Electric	16	17
Proctor-Silex	12	10
All others	24	13

	1983	1982
Can Openers		
Rival	40%	43%
General Electric	22	24
Sunbean	18	18
All others	20	15
Percolator Coffee Makers		
Faberware	33%	22%
Regal Ware	33	40
West Bend	17	10
General Electric	10	10
All others	7	18

(continued)

ELECTRIC HOUSEWARES PRODUCT SHIPMENTS

Concentration Levels

Manufacturers' Share of Total Shipment Value of Specified Electric Housewares, 1982 & 1983
(continued)

Food Processors	1983	1982
Cuisinart	30%	35%
General Electric	20	15
Hamilton Beach	20	17
Moulinex Regal	15	12
All others	15	21

Irons	1983	1982
General Electric	55%	56%
Proctor-Silex	22	20
Sunbeam	14	14
Scovill	10	10

Toasters	1983	1982
Proctor-Silex	39%	56%
Toastmaker	32	21
General Electric	19	17
All others	10	6

Toaster Ovens	1983	1982
General Electric	58%	62%
Toastmaster	18	8
Proctor-Silex	15	19
All others	9	11

Source: Appliance Manufacturer,
8th Annual Appliance Industry Marketing Guide-1984
(All rights reserved).

Distribution of Manufacturers' Sales

Data supplied by the National Housewares Manufacturers Association shows that 83% of housewares manufacturers' sales in 1984 were to retail outlets. The remaining 17% went to wholesale outlets, the lowest incidence of sales to wholesalers in the past eighteen years. These findings are based on the responses of 578 manufacturers to the NHMA's 18th Annual Marketing Research Study. The survey, conducted by B. Angell & Associates, solicits industry information from all types of housewares manufacturers, not just those manufacturing electric housewares.

Percent of Total Dollar Sales By Housewares Manufacturers To Retail Outlets, 1983, 1984

Retail Outlets (83% of Total)	1984	1983	1982
Mass Merchandisers	38%	30%	28%
Department Stores	10	8	9
Catalog Showrooms	9	9	12
Food Stores	7	6	5
Drug Stores	5	5	6
Housewares/Hardware Stores	3	5	5
Variety Stores	2	4	3
Mail Order	2	3	na
Home Centers	2	2	na
All other	5	7	na

na not available.

Source: National Housewares Manufacturers Association, 18th Annual Marketing Research Study of Housewares Manufacturers, 1984.

ELECTRIC HOUSEWARES PRODUCT SHIPMENTS

Distribution of Manufacturers' Sales

The survey also reveals the high unit costs of electric houseware products. While only 11% of all houseware manufacturers fall into this category, it accounts for one-third of all sales, by far the largest segment. The largest group of housewares manufacturers, based on the survey, are those producing decorative accessories products (12% of the total).

FOREIGN TRADE IN ELECTRIC HOUSEWARES

Imports

The labor-intensive nature of electric housewares production--with fewer variations in design and size than major appliances--has facilitated the penetration of imports into the marketplace. Foreign goods accounted for 48% by value of apparent consumption of fans, 42% of electric irons, and 28% of space heaters.

Quantity & Value of Imports of Specified Electric Housewares, 1983 & 1984

	Quantity (Thous. Units)			C.I.F. Value* (Mil. $)		
	1984	1983	% Change 1984/83	1984	1983	% Change 1984/83
Toasters	523.7	289.5	+80.9%	$ 5.4	$ 3.2	+ 68.8%
Coffee makers	1,861.1	950.9	+95.7	39.5	16.6	+138.0
Electro-mechanical food blenders, food mixers and juice extractors	3,468.7	2,645.6	+31.1	35.4	25.4	+ 39.4
Electro-mechanical food grinders, slicers and choppers	1,080.3	1,227.4	-12.0	19.9	21.5	- 7.4
Portable cooking and food-warming appliances, nspf	1,451.6	2,177.9	-33.3	28.8	26.4	+ 9.1
Electro-mechanical appliances, nspf	2,165.6	1,551.6	+39.6	63.8	49.0	+ 30.2
Electrothermic appliances, nspf	8,436.1	9,600.5	-12.1	80.6	83.7	- 3.7
Flat irons, electric	7,613.6	6,675.3	+14.1	81.4	65.0	+ 25.2
Electric shavers	5,362.6	4,014.1	+ 3.6	77.4	59.8	+ 29.4
Electric hair dryers	19,746.1	19,110.8	+33.3	113.0	109.7	+ 3.0
Electric hair curlers	na	na	--	61.8	68.8	- 10.2
Electric hair care appliances, nspf	na	na	--	55.2	43.3	+ 27.5

na not available. nspf not specially provided for.

* The C.I.F. (cost, insurance, freight) value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price, as well as all freight, insurance and other charges (excluding U.S. import duties), incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Department of Commerce,
U.S. General Imports (FT135),
December 1983, 1984.

FOREIGN TRADE IN ELECTRIC HOUSEWARES

Exports

Canada, Saudi Arabia, Mexico, the United Kingdom, and West Germany were the major export markets for U.S. producers in 1983. Canada and Saudi Arabia accounted for 23% and 13% of the shares, respectively for that year. Exports of portable household cooking equipment, including food or plate warmers, more than doubled in 1984 in both quantity and value, as the result of an enormous increase in exports of these products to Canada.

Quantity & Value of Exports of Specified Electric Housewares, 1983 & 1984

	Quantity (Thous. Units)			Value* (Mil. $)		
	1984	1983	% Change 1984/83	1984	1983	% Change 1984/83
Toasters	816.5	940.7	-13.2%	$11.8	$15.6	- 24.4%
Coffee makers	721.3	885.7	-18.6	14.3	13.7	+ 4.4
Portable household cooking apparatus, including food or plate warmers, of base metal	826.4	326.6	+153.0	33.0	14.7	+124.5
Electro-mechanical food blenders, mixers and juice extractors	440.2	505.5	-12.9	12.8	13.8	- 7.2
Food grinders, slicers and choppers, electro-mechanical	59.2	128.3	-53.9	3.3	5.4	- 38.9
Can openers, including combination units, electro-mechanical	177.4	150.5	+17.9	2.3	1.8	+ 27.8
Portable electrothermic kitchen and household appliances	459.2	451.5	+ 1.7	15.3	14.7	+ 4.1
Electro-mechanical appliances, nsfp	531.0	499.4	+ 6.3	18.5	18.7	- 1.1
Flat irons, electric	452.8	577.8	-21.6	4.7	5.8	- 19.0
Electric shavers	447.7	367.4	+21.9	5.3	3.8	+ 39.5
Hairdressing appliances, electric	na	na	--	2.1	2.9	- 27.6

na not available. nspf not specially provided for.

* Value is equivalent to f.a.s. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including inland freight, insurance and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. It excludes the cost of loading the merchandise aboard the carrier as well as freight, insurance and any other charges beyond the port of exportation.

Source: U.S. Department of Commerce,
U.S. General Exports (FT410),
December 1983, 1984.

TOP HOUSEWARES SUPPLIERS

The following is a listing of the leading housewares producers based in the United States. The firms were ranked by their estimated sales volume worldwide, as of January 1985. Sales volume was defined as the company's annual revenue derived from housewares products that moved through traditional retail channels, including department stores, mass merchants, and hardware stores.

Allegheny International and Black & Decker ranked first and second, respectively, in 1984. These are the same positions that they held in 1983. Allegheny International recorded estimated housewares sales of $900 million for the year, more than one-third of it outside the U.S. The firm's Sunbeam and Oster lines are enabling it to challenge Black & Decker for leadership in the small appliance market. Black & Decker, on the other hand, is continuing the integration of General Electric's housewares products into its own lines.

Top Housewares Suppliers, 1984

Rank	Company (and headquarters)	Estimated Housewares Sales (in millions)
1	Allegheny International, Pittsburgh, PA	$ 900
2	Black & Decker Corp. Towson, MD	600-650
3	Hoover Co., North Canton, OH	490
4	Corning Glass Works, Corning, NY	400
5	Rubbermaid, Inc., Wooster, OH	400
6	Norelco Consumer Products, Stamford, CN	325
7	Anchor Hocking Corp., Lancaster, OH	320
8	Eureka Co., Bloomington, IL	275
9	Wear-Ever/Proctor-Silex, Chillicothe, OH	250
10	Kidde, Inc., Saddle Brook, NJ	225-250
11	Dart & Kraft, Northbrook, IL	225
12	Ekco Group, Inc., Franklin Park, IL	220
13	Newell Cos., Inc., Freeport, IL	180-190
14	Regal Ware, Inc., Kewaskum, WI	180-190
15	Hamilton Beach, Waterbury, CN	180

Source: "The Top 50 Housewares Suppliers",
HFD - Retailing Home Furnishings, Sept. 30, 1985

MAJOR APPLIANCES & ELECTRIC HOUSEWARES

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

Privately-owned housing starts during the first six months of 1985, were off 6.5% from the same period in 1984. This comes on the heels of a 2.7 annual increase from 1983 to 1984. Since approximately a quarter of all major appliance sales are made to builders, the downturn this year must be viewed with some concern by the industry, despite the Commerce Department's prediction of renewed improvement in starts before the end of the year.

New Privately Owned Housing Units Started, 1983, 1984 and January-June 1984, 1985
(Thousands of units, seasonally adjusted)

	January-June Starts			Annual Starts		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Privately-owned housing starts	854.4	914.1	- 6.5%	1,749.5	1,703.0	+ 2.7%

Source: U.S. Bureau of the Census,
Construction Reports Division.

New Privately Owned Housing Units Authorized, 1983, 1984 and January-June 1984, 1985
(Thousands of units)

	January-June Authorizations			Annual Authorizations		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Privately-owned housing starts	845.3	899.1	- 6.0%	1,660.1	1,605.2	+ 3.4%

Source: U.S. Bureau of the Census,
Construction Reports Division.

The average U.S. household had a reported income of $25,401 in 1983, led by households with a person aged 45-54 as its head. The proliferation of two-income families has endowed these families with rising levels of discretionary income, a part of which they are targeting for the purchase of appliances and housewares (see section on Consumer Buying Habits).

Total Money Income of Households by Age of Householder, 1983
(Number of households as of March 1984)

		Age of Householder					
	Total	15-24	25-34	35-44	45-54	55-64	65 & over
Number of households (000)	85,407	5,510	19,808	16,596	12,471	13,121	17,901
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total money income:							
Under $10,000	22.9	35.9	17.2	12.5	13.5	21.3	42.6
$10,000-$19,999	25.0	35.2	27.5	20.1	17.2	22.6	30.8
$20,000-$29,999	20.0	19.2	25.5	22.1	18.6	19.7	13.6
$30,000-$39,999	13.7	6.3	16.3	18.1	17.5	14.2	6.0
$40,000-$49,999	8.1	2.0	7.6	11.9	12.8	8.8	3.3
$50,000-$74,999	7.4	1.2	4.9	11.2	14.1	9.4	2.6
$75,000 & over	2.8	0.1	1.1	4.1	6.3	4.0	1.1
Median income	$20,885	$13,401	$21,740	$27,679	$30,351	$22,777	$11,718
Mean income	25,401	15,451	24,121	31,442	34,203	27,807	16,386

Source: U.S. Bureau of the Census,
Current Population Reports,
Consumer Income P-60 No. 146.

The South accounted for the bulk of new housing starts in the nation in 1984, though construction in that region has declined as a percent of the U.S. total. The Northeast and West have increased their shares of the new housing market, with both areas attaining their highest levels of the decade. The Midwest has rebounded from four consecutive years of a declining share, though the area has not returned to its 1980 level.

Location of New Housing Starts In the U.S., 1980-1984

	1984	1983	1982	1981	1980
U.S. Total	1,749.5	1,703.0	1,062.0	1,084.2	1,292.2
Percent	100.0%	100.0%	100.0%	100.0%	100.0%
Northeast	11.7	9.8	11.0	10.8	9.7
Midwest	13.9	12.8	14.0	15.2	16.9
South	49.5	54.9	55.6	51.8	49.7
West	24.9	22.4	19.3	22.1	23.7

Source: U.S. Bureau of the Census,
Construction Reports Division.

THE CONSUMER MARKET

The total value at retail of all major appliances and electric housewares reaching consumers was nearly $24.3 billion in 1984, an 11.2% gain for the year. In constrast, the annual rate of increase for 1982, in the midst of the U.S. recession, was just 2.1%

This figure covers the retail value spent on these goods by consumers through a variety of channels, such as retail outlets. Also included are direct sales by manufacturers, premiums and the value of the goods in new privately-owned housing units. Not included are sales to the institutional market, such as hospitals and schools.

Personal Consumption Expenditures For Major Appliances & Electric Housewares, 1981-1984
(Millions of dollars)

1984(p)	1983(p)	1982(r)	1981(r)	% Change 1984/1983
$24,276	$21,837	$19,911	$19,508	+ 11.2%

(p) preliminary (r) revised

Source: U.S. Department of Commerce,
Bureau of Economic Analysis.

Household Expenditures For Appliances & Housewares

In April 1985, the Bureau of Labor Statistics (BLS) of the U.S. Department of Labor issued a report based on its 1980-81 Consumer Expenditure Survey. The report contains data, averaged for the two years, on urban household expenditures for major appliances and small appliances/miscellaneous housewares. Unlike the data on Personal Consumption Expenditures compiled by the U.S. Census Bureau, the BLS surveys cover direct purchases only, and do not include, for example, the value of appliances in new housing units.

The BLS surveys show average annual expenditures per household in terms of various demographic considerations such as the age of the householder, the household's income before taxes, and housing tenure (homeowner vs. renter). Projections made by Fairchild reveal the propensity of those in different classifications to make purchases. For example, expenditures on small appliances/miscellaneous housewares were led by households whose head was in the 55-64 age group. They had a reported 26.3% share of these purchases, reflecting their propensity for gift giving, though these households accounted for just 15.2% of the total number of households. In another instance 61.5% of those interviewed were homeowners while 38.5% were renters. In purchasing major appliances, however, the homeowners accounted for a nearly 80% share to just 20.5% for renters.

Urban Household Expenditures For Appliances & Housewares, 1980-81 Average

By Age of Householder

	Total	Under 25	25-34	35-44	45-54	55-64	65 & Over
Number of consumer units (thous.)	68,295	7,408	16,083	11,422	9,685	10,410	13,287
Percent of Total	100.0%	10.8%	23.6%	16.7%	14.2%	15.2%	19.5%
Average age of householder (years)	46.2	21.6	29.5	39.2	49.5	59.3	73.6
Average size of household (persons)	2.7	1.8	2.8	3.8	3.4	2.4	1.7
Average household income (after taxes)	$17,483	$10,092	$18,222	$22,307	$24,474	$19,115	$10,162
Average expenditure per household:							
Major appliances	$ 129	$ 84	$ 150	$ 151	$ 175	$ 118	$ 87
Small appliances/miscellaneous housewares	$ 60	$ 41	$ 60	$ 75	$ 75	$ 75	$ 34

By Household Income Before Taxes

	Total	$30,000 & Over	$20,000 29,999	$15,000 19,999	$10,000 14,999	Under $10,000
Number of consumer units (thous.)	68,295	11,997	12,165	7,426	8,357	17,412
Percent of Total	100.0%	17.5%	17.8%	10.9%	12.2%	25.5%
Average age of householder (years)	46.2	44.5	41.4	42.1	43.2	51.0
Average size of household (persons)	2.7	3.4	3.1	2.7	2.5	1.9
Average household income (after taxes)	$17,483	$37,468	$21,190	$15,654	$11,281	$ 4,904
Average expenditure per household:						
Major appliances	$ 129	$ 226	$ 166	$ 126	$ 103	$ 59
Small appliances/miscellaneous housewares	$ 60	$ 114	$ 71	$ 55	$ 44	$ 27

* Total includes 10.9 thousand households for which income was not reported.

By Housing Tenure

	Total	Homeowner	Renter
Number of consumer units (thous.)	68,295	41,990	26,305
Percent of Total	100.0%*	61.5%	38.5%
Average age of householder (years)	46.2	50.5	39.4
Average size of household (persons)	2.7	3.0	2.2
Average household income (after taxes)	$17,483	$21,307	$11,642
Average expenditure per household:			
Major appliances	$ 129	$ 167	$ 69
Small appliances/miscellaneous housewares	$ 60	$ 72	$ 40

Projected Total Expenditures of Urban Households, 1980-81 Average

	Major Appliances	Small Appliances/ Miscellaneous Housewares
By age of householder:		
Total	100.0%	100.0%
Under 25	7.0	6.6
25-34	27.3	21.1
35-44	19.5	18.7
45-54	19.1	17.1
55-64	14.0	26.3
65 & over	13.1	10.2
By income before taxes of household:		
Total	100.0*	100.0*
$30,000 & over	30.7	33.3
$20,000-29,999	22.9	21.0
$15,000-19,999	10.6	10.0
$10,000-14,999	9.8	9.0
Under $10,000	11.7	11.5
By housing tenure of householder:		
Total	100.0	100.0
Homeowner	79.5	74.1
Renter	20.5	25.9

* Total includes households for which income was not reported.

Major appliances includes refrigerators, freezers, dishwashers, stoves, ovens, garbage disposals, vacuum cleaners, microwaves, air conditioners, sewing machines, washing machines, dryers, and floor cleaning equipment.

Small appliances/miscellaneous housewares includes small electrical kitchen appliances, portable heating and cooling equipment, china and other dinnerware, flatware, glassware, silver and other serving pieces, non-electric cookware, and plastic dinnerware. Excludes personal care appliances.

Source: Fairchild Market Research Division based on
Consumer Expenditure Survey, 1980-81,
Bulletin 2225, April 1985.

RETAIL SALES BY TYPE OF OUTLET

The Bureau of the Census has recently released reports on retail sales of specific major merchandise categories by type of retail outlet as a result of the complete census of retail trade covering operations in 1982. The merchandise line information includes sales in establishments with payroll, which, of course, provides quite complete coverage of the major appliance/ electric housewares retail market.

A complete census of retail trade is compiled by the Census Bureau every five years and it provides the only available information on merchandise line sales in all types of retail outlets.

According to the 1982 census, retail establishments selling major appliances numbered 61,383; those selling small electric appliances (electric housewares) totaled 69,910. Sales of major appliances were reported at $11.4 billion; of small electric appliances, $4.4 billion.

Due to a change in the method of classifying leased departments, direct comparisons cannot be made with findings on retail stores and merchandise line sales in 1977 and in 1982. In the 1977 census, leased departments were not reported as separate operations but were combined in the data for the store in which operated. In the 1982 census, however, leased departments are classified as separate establishments in their specialized kind of business.

Following the prevailing methodology, in the 1977 census of retail trade establishments with payroll which sold major appliances were reported at 71,966; stores selling electric housewares, 81,725.

Sales of major appliances in 1982 through retail outlets were up 23.5% over the $9.2 billion reported for 1977. Sales of electric housewares in 1982 gained 53.7% over the reported 1977 total of $2.8 billion. It should be noted that the sales figures are on a current dollar basis and inflation must be taken into consideration in evaluating sales gains. (It should also be kept in mind that major appliances reaching the consumer through other than covered retail channels are not included in the sales figures.)

As classified by the Census Bureau, household appliance stores and department stores held an almost-equal share of total major appliance retail sales in 1982 (about 32%), and were by far the dominant outlet types.

Major Household Appliance Sales By Leading Retail Outlet Types, 1982

	No. of Establishments	Sales (thous. $)	Percent of Sales
Major household appliances	61,383	$ 11,336,558	100.0%
Leading outlet types:			
Building materials, hardware, garden supply, mobile home dealers	9,008	479,756	4.2
Department stores	6,286	3,585,980	31.6
Furniture stores	10,270	831,595	7.3
Household appliance stores	10,239	3,625,163	32.0
Radio/television stores	2,691	634,021	5.6
Nonstore retailers:			
Mail order houses*	3,318	510,137	4.5
Direct sellers	1,952	576,671	5.1
All other outlets	17,619	1,093,235	9.7

(continued)

RETAIL SALES BY TYPE OF OUTLET

(Footnote continued)

* Sales from catalog order desks in department stores or other outlets are included in data on the specific store type in which operated. Stores operated by mail order chains, such as Sears, are counted in the specific store classification defining their operations under SIC definitions.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Small Electric Appliance Sales By Leading Retail Outlet Types, 1982

	No. of Establishments	Sales (thous. $)	Percent of Sales
Small electric housewares	69,910	$ 4,380,812	100.0%
Leading outlet types:			
Building materials, hardware, garden supply, mobile home dealers	10,702	243,553	5.6
Department stores	8,891	2,115,475	48.3
Variety and other general merchandise stores	14,308	730,457	16.4
Grocery stores	3,995	201,735	4.6
Household appliance stores	1,758	141,502	3.2
Drug stores	14,559	561,945	12.8
Nonstore retailers:			
Mail order houses*	3,098	153,560	3.5
All other outlets	12,599	232,585	5.6

* See footnote on above table.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Appliance Store Sales of Major Appliances/Electric Housewares

In reporting on merchandise line sales in 1982, based on a complete census of retail trade, the U.S. Bureau of the Census has included the following information on major appliance and small electric appliance sales in appliance stores with payroll.

Major Appliance & Small Electric Appliance Sales in Household Appliance Stores, 1982

	Established Selling Merchandise Line	Sales of Specified Merchandise Line		
		Total (thous.) $	% of Total Sales of: Stores Selling Line	All Appliance Stores
Major appliances	10,239	$3,625,163	64.7%	63.6%
Kitchen appliances	8,198	2,019,581	39.5	35.4
Laundry appliances	6,969	886,145	20.0	15.6
Other major household appliances	7,631	719,437	16.9	12.6
Small electric appliances	1,758	141,502	10.9	2.5

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3.

RETAIL SALES BY OUTLET TYPE

Appliance Store Firms/Stores

The fifty largest firms operating household appliance stores account for one-fifth of the total sales volume of $5.7 billion (all types of merchandise) generated by these outlets. These same fifty firms operate only 3.9% of the stores, illustrating how the major owners dominate the marketplace.

Concentration by Largest Firms of Household Appliance Stores, 1982
(Sales in millions of dollars)

	Number	%	Sales	%
Household appliance stores, total	10,542	100.0%	$5,697.3	100.0%
4 largest firms	147	1.4	435.4	7.6
8 largest firms	181	1.7	556.4	9.8
20 largest firms	294	2.8	792.7	13.9
50 largest firms	412	3.9	1,133.9	20.0

A more detailed look at home appliance store sales is covered in the 1982 census of retail trade. This data shows the extent to which the major stores, though a relatively small segment in number, account for a large share of appliance sales.

Household Appliance Stores, 1982
(Sales in millions of dollars)

	Firms		Stores		Sales	
	Number	%	Number	%	Number	%
Household appliance stores, total*	9,226	100.0%	10,542	100.0%	$5,593.0	100.0%
Single unit	8,253	89.5	8,253	78.3	3,414.8	61.1
Multi unit	973	10.5	2,289	21.7	2,178.2	38.9
Under 10 stores	955	10.4	1,928	18.3	1,597.9	28.6
10 or more stores	18	0.2	361	3.4	580.3	10.4
Firms in operation entire year	8,809	100.0	10,122	100.0	5,486.5	100.0
With annual sales of:						
$10 million or more	37	0.4	370	3.7	1,007.2	18.4
$5 million - $9.9 million	52	0.6	191	1.9	341.9	6.2
$2.5 million - $4.9 million	211	2.4	406	4.0	708.5	12.9
$1 million - $2.49 million	859	9.8	1,128	11.1	1,281.9	23.4
Under $1 million	7,650	86.8	8,027	79.3	2,146.8	39.1
Stores in operation entire year			10,094	100.0	5,440.7	100.0
$2.5 million - $10 million			306	3.0	1,359.2	25.0
$1.0 million $2.49 million			1,048	10.4	1,565.1	28.8
$500,000 - $999,999			1,729	17.1	1,206.0	22.2
$250,000 - $499,999			2,131	21.1	763.3	14.0
Under $250,000			4,880	48.3	547.1	10.1

* Firms in business at end of year.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade,
Establishment and Firm Size, RC82-I-1.

RETAIL SALES BY OUTLET TYPE

Appliance Store Firms/Stores

Sales of home appliance stores for the first six months of 1985 totaled $3.9 billion, an increase of 10.5% over the same period in 1984, according to the Bureau of the Census.

Total Sales of Household Appliance Stores, 1983-1984

	1984	1983	% Change 1984/1983
Total sales (mil. $)	$7,899	$6,876	+ 14.9%

Source: U.S. Bureau of the Census, Revised Monthly Retail Sales.

Monthly Sales Pattern in Household Appliance Store Sales, 1983, 1984

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
1984	7.0%	6.7%	7.2%	7.0%	7.5%	9.1%	8.9%	8.8%	8.5%	8.4%	9.3%	11.6%	100.0%
1983	6.6	6.3	7.2	7.3	7.5	8.5	9.6	9.0	8.5	8.3	9.4	11.8	100.0

Source: Based on U.S. Bureau of the Census, Revised Monthly Retail Sales, BR-13-85.

Department Store Sales of Major Appliances/Electric Housewares

In recent years there has been a tendency for department stores to eliminate major household appliance departments in their stores. According to the 1977 census of retail trade, 5,861 of the total count of 8,807 department stores (66.5%) sold major appliances. In 1982, 6,286 department stores out of a total of 9,981 in the U.S. (63%) sold major appliances.

In the department stores handling major appliances, these accounted for 5.2% of sales in 1983, 5.3% in 1977. Of total department store sales, including stores not handling major appliances, this merchandise represented 3.6% of 1982 sales vs. 4.1% in 1977.

The contribution of small electric appliance sales to department store business has grown since 1977. In that year this merchandise represented 1.7% of the sales of department stores carrying the line (92% of the stores). In 1982 electric housewares represented 2.4% of the sales of department stores carrying the line (89% of the department stores). Of all department store sales, electric housewares accounted for 2.1% in 1982 vs. 1.6% in 1977.

RETAIL SALES BY OUTLET TYPE

Department Store Sales of Major Appliances/Electric Housewares

Major Appliance & Small Electric Appliance Sales in Department Stores, 1982

	Established Selling Merchandise Line	Sales of Specified Merchandise Line: Total (thous.) $	Percent of Total Sales of: Stores Selling Line	Percent of Total Sales of: All Department Stores
Major household appliances	6,286	$3,585,980	5.2%	3.6%
Kitchen appliances	3,149	1,731,468	3.8	1.7
Laundry appliances	2,145	798,540	2.1	0.8
Other major appliances	5,482	1,055,972	1.7	1.1
Small electric appliances	8,891	2,115,475	2.4	2.1

Source: U.S. Bureau of the Census
1982 Census of Retail Trade, RC82-1-3.

Department Store Operations

Typical (median) operating results for major appliance and electric housewares departments in department stores with a total volume of over $1 million are reported annually by the National Retail Merchants Association, Controllers' Congress. Results for the latest available year (1983) are reported in the following table.

Merchandising & Operating Results of Major Appliance & Small Electrical Appliance Departments in Department Stores, 1983

(Median results in stores with total sales over $1 million)

	Total Upstairs Store (100*)	Major Appliances (43*)	Vacuums & Floor Polishers (13*)	Small Electrical Appliances (70*)
Net sales, % change from last year	+ 8.8%	+ 6.9%	+14.4%	+12.0%
Sales, % of merchandise division**	--	26.6	7.6	31.1
Sales, % of total store sales	91.7	0.9	0.3	1.2
$ sales per square foot of selling space (main or largest selling unit)	$109.9	$215.1	$283.8	$134.5
Cumulative markon, %	48.6%	27.0%	30.6%	28.1%
Gross margin, % of sales (including cash discounts)	41.9	22.0	25.3	21.8
Markdowns, % of sales (including employee discounts)	14.9	5.9	9.2	8.0
Number of stock turns	2.7	3.5	3.2	2.5

* Number in parenthesis refers to the number of reporting firms in each category.

** The merchandise division for all three departments is appliances and utility equipment.

Source: National Retail Merchants Association,
Merchandising & Operating Results of 1983.

Estimated Retail Sales of Major Appliances In 25 Leading Metropolitan Areas, 1982 and 1983

		1983 (Mil. $)		1982 (Mil. $)	
1983 Rank	Metropolitan Area	Total	% of U.S. Total	Total	% of U.S. Total
1	Los Angeles-Long Beach	$497.9	3.3%	$446.2	3.2%
2	Boston-Lawrence-Salem-Lowell	386.7	2.5	339.2	2.4
3	Chicago	357.1	2.3	335.7	2.4
4	New York	301.5	2.0	273.0	1.9
5	Houston	261.3	1.7	247.3	1.8
6	Philadelphia	260.7	1.7	244.3	1.7
7	Detroit	254.8	1.7	253.6	1.8
8	Washington, D.C.	198.9	1.3	179.0	1.3
9	Dallas	196.7	1.3	172.5	1.2
10	Anaheim-Santa Ana	173.9	1.1	149.7	1.1
11	Nassau-Suffolk	166.1	1.1	147.4	1.1
12	San Diego	146.2	1.0	127.5	0.9
13	Minneapolis-St. Paul	133.0	0.9	130.8	0.9
14	Atlanta	132.2	0.9	124.0	0.9
15	Pittsburgh	125.8	0.8	122.5	0.9
16	Seattle	125.1	0.8	116.4	0.8
17	Miami-Hialeah	123.8	0.8	117.8	0.8
18	Tampa-St. Petersburg	122.0	0.8	107.8	0.8
19	Baltimore	117.8	0.8	112.5	0.8
20	Denver	117.4	0.8	108.9	0.8
21	St. Louis	114.0	0.7	109.4	0.8
22	San Jose	106.2	0.7	90.7	0.6
23	Portland	105.0	0.7	98.9	0.7
24	Riverside-San Bernardino	104.7	0.7	93.3	0.7
25	San Francisco	103.9	0.7	86.1	0.6
	25 Metropolitan areas, total	$4,732.7	31.1	$4,334.5	30.9
	U.S. total	15,210.3	100.0	14,019.3	100.0

Source: Based on Sales & Marketing Management "Survey of Buying Power", 1982, 1984. All rights reserved.

MICROWAVE OVEN SALES

The Association of Home Appliance Manufacturers projects that microwave ovens will attain a 50% household penetration by 1986. Industry sources place that figure as high as 65%-70%, as eastern and midwestern parts of the nation rise to the level of microwave penetration already present in the West.

Many of these sales will be coming from the housewares departments of mass merchants, catalog showrooms, and department stores. As ovens become smaller and retail prices lower, manufacturers are turning increasingly toward houseware departments to expand their distribution. Housewares buyers, who had previously left the sale of microwave ovens to traditional appliance retailers and major appliance departments, are now calling microwaves a "basic" for their departments. Manufacturers hope to take advantage of the large and broad audiences attracted to many housewares departments, as well as the prominent displaying of their models on the selling floor. Housewares retailers, impressed with the improved styling of microwaves, are hoping for even more dramatic product design to draw customers. Retailers, in addition, are pushing microwave prices down; the most talked about model today is the $99 microwave.

Percent of Year's Microwave Oven Sales by Month, 1984

	% of Sales
January	10.9%
February	5.7
March	4.9
April	5.5
May	7.4
June	4.8
July	7.4
August	5.4
September	4.6
October	8.2
November	10.3
December	24.9
Average per month	8.3%

Source: Newspaper Advertising Bureau, 1985 Newspaper Advertising Planbook.

CONSUMER PRICES

Consumer prices for all household appliances stayed virtually the same during 1984 as they were in 1983 (+ 0.3%). The price level for laundry equipment, as in the past, rose at a faster rate.

Consumer Price Indexes for Specified Major Appliances, 1983, 1984 & June, 1984, 1985

	June Monthly Averages			Annual Averages		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
All items	322.3	310.7	+ 3.7%	311.1	298.4	+ 4.3%
Household appliances	184.2	189.7	- 2.9	188.9	188.4	+ 0.3
Refrigerators & home freezers	193.8	196.8	- 1.5	196.4	193.3	+ 1.6
Laundry equipment (12/77=100)	147.1	145.0	+ 1.4	146.6	143.0	+ 2.5
Other household appliances (12/77=100)	120.1	125.4	- 4.2	124.5	125.2	- 0.6
Stoves, dishwashers, vacuums & sewing machines (12/77=100)	120.3	127.0	- 5.3	124.6	124.3	+ 0.2
Office machines, small electric appliances & air conditioners (12/77=100)	120.2	124.4	- 3.4	124.3	126.4	- 1.7

RETAIL ADVERTISING

Percent of Year's Total Newspaper Ad Linage Done By Retailers Each Month, 1984

	Clothes Dryers	Clothes Washers	Refrigerators	Room Air Conditioners	Small Electric Appliances
January	9.9%	9.5%	7.8%	3.8%	3.2%
February	7.3	7.9	7.0	4.0	5.6
March	9.4	7.9	6.2	5.3	6.7
April	6.9	7.2	6.9	6.6	6.0
May	8.3	7.7	9.2	15.8	12.4
June	8.1	9.1	9.7	25.0	5.1
July	10.0	10.1	12.4	25.8	3.7
August	7.4	7.1	10.9	9.0	4.8
September	8.5	8.7	9.3	2.8	7.4
October	7.4	8.3	6.3	0.7	6.9
November	9.5	9.1	6.4	0.4	17.0
December	7.3	7.5	7.9	0.8	21.2

Source: Advertising Checking Bureau, 1984, Neustadt Reports Division based on newspaper advertising in Chicago, Philadelphia, Cincinnati, Cleveland, Dallas, Los Angeles, and Washington, D.C.

CONSUMER BUYING HABITS

Consumer Buying Intention Survey

Consumer Track is a new semi-annual survey of consumer purchases and purchase intentions conducted for HFD--Retailing Home Furnishings. Its objective is the tracking of changes in the housewares market over time.

Thus far, two of these surveys have been done--one in the Summer of 1984 and one in the Winter of 1985. The data presented in Consumer Track is based on a nationally represented sample of 10,000 households. Respondents were sent mail questionnaires by NFO Research, Inc. (National Family Opinion). The NFO panel consists of households selected to conform to the latest Census data in regard to market size, household income, and other demographic considerations.

Intention to Buy Versus Actual Purchases

In eight out of the ten product categories reported, respondents purchased more housewares than they said they would six months earlier. Microwave cookware was most popular with the surveyed households, with 6.6% indicating their intent to purchase it and 10.5% actually following through. Only the purchases of irons and electric mixers did not exceed the expected purchase rates of respondents.

Intended Versus Actual Housewares Purchases
(Percent of surveyed households)

	Intent to Purchase (Summer 1984)	Actual Purchase (Winter 1985)
Microwave cookware	6.6%	10.5%
Coffee maker	5.6	8.4
Iron	5.6	5.2
Toaster	3.4	3.5
Electric can opener	3.4	4.2
Hair dryer	3.1	5.9
Full-sized vacuum	2.8	3.8
Toaster-oven	2.2	2.4
Electric mixer	2.2	2.2
Food processor	1.8	2.2

Source: HFD - July 8, 1985.

Seasonal Purchase Patterns

The seasonal nature of the retail market and, in particular, the higher sales reported in the second half of the year, is evident in the housewares business. All ten product categories had higher sales levels in the Winter, 1985 than in the Summer 1984. Microwave cookware and coffee makers were, respectively, the two products purchased most by survey respondents in both time periods.

CONSUMER BUYING HABITS

Consumer Buying Intention Survey

Seasonal Purchase Patterns

Consumer Housewares Purchases, Summer 1984 and Winter 1985
(Percent of households making purchase)

	Summer 1984	Winter 1985
Microwave cookware	6.7%	10.5%
Coffeemaker	5.9	8.4
Iron	4.6	5.2
Hair dryer	3.9	5.9
Full-sized vacuum	3.3	3.8
Electric can opener	2.5	4.2
Toaster	2.8	3.5
Toaster-oven	1.6	2.4
Electric mixer	1.5	2.2
Food processor	1.0	2.2

Source: HFD - July 8, 1985.

Purchases by Store Type

Discount chains were, by a wide margin, the preferred outlet for housewares purchases by respondents. With the exception of vacuums, all product categories had the most sales in discount stores, often accounting for more sales than the other store types combined. Vacuums had the majority of its sales in national chains (such as Sears).

Distribution of Housewares Purchases by Store Type, Summer 1984
(Percents of units purchased)

	Microwave Cookware	Coffee Maker	Iron	Toaster	Electric Mixer	Toaster Oven	Food Processor
Department store	13.5%	14.4%	17.9%	9.0%	18.6%	13.6%	16.9%
Appliance Store	4.2	1.8	2.3	2.6	2.3	3.4	3.4
Discount chain	52.9	48.9	44.3	54.5	39.5	50.0	23.7
National chain*	11.5	7.5	7.3	10.9	9.3	3.4	13.6
Hardware store	2.3	3.9	3.8	7.7	2.3	3.4	3.4
Catalog showroom	3.9	14.4	13.0	9.0	10.5	19.3	18.6
Other store types	11.7	9.0	11.5	6.4	17.4	6.8	20.3

	Electric Can Opener	Full-sized Vacuum	Hair Dryer
Department store	15.0%	17.2%	8.3%
Appliance Store	1.4	9.1	0.5
Discount chain	45.7	14.0	49.5
National chain*	7.1	28.5	12.5
Hardware store	4.3	4.8	0.9
Catalog showroom	13.6	5.9	8.8
Other store types	12.9	20.4	19.4

* Sears, Ward, Penney, K mart.

Source: HFD-January 14, 1985.

CONSUMER BUYING HABITS

Consumer Buying Intention Survey

Replacement or First-time Purchases

Eight of the ten product categories had a higher incidence of purchase as replacement items rather than as new items, according to the survey. Reflecting the relative newness of the products, only microwave cookware and food processors are still being purchased more as new items.

Housewares Purchases: Replacement Versus First-time Purchases, Winter 1985
(Percent of respondents making purchase)

	Replacement Purchase	First-time Purchase
Iron	83.2%	8.1%
Toaster	81.9	11.7
Full-sized vacuum	79.3	17.8
Hair dryer	79.2	13.0
Electric can opener	76.1	15.4
Coffee maker	70.2	24.3
Electric mixer	69.4	25.8
Toaster oven	56.1	37.9
Food processor	20.3	75.4
Microwave cookware	9.7	82.5

Source: HFD-May 13, 1985.

Purchase Price for Housewares

The average price that households paid for housewares in the Winter 1985 were less than those paid in the Summer 1984 in seven of the ten categories reported here. The biggest drop was in the purchase of food processors, a 16.8% decline to $77.54. The biggest rise was in the price of electric mixers, a gain of more than 18% to $53.64.

Prices Paid for Housewares, Summer 1984 and Winter 1985

	Average price paid (Summer 1984)	Average price paid (Winter 1985)
Full-sized vacuum	$198.93	$192.60
Food processor	93.15	77.54
Toaster-oven	47.57	46.27
Electric mixer	45.26	53.64
Coffee maker	28.72	29.52
Microwave cookware	25.14	23.78
Iron	20.71	23.15
Toaster	20.17	18.98
Electric can opener	16.68	15.93
Hair dryer	13.68	14.07

Source: HFD-July 8, 1985.

CONSUMER BUYING HABITS

Consumer Buying Intention Survey

Purchases by Region

Demand for housewares products in eight of the ten product categories was strongest in the Southern states. Sales of electric can openers, irons and microwave cookware were particularly high in that region. The two exceptions to the dominance of this area lie in the purchases of toasters by respondents living in the North Central region and in the purchase of food processors by Northeastern households.

Distribution of Housewares Purchases by Region, Summer 1984
(Percent of purchasers living in each region)

	Microwave Cookware	Coffee maker	Iron	Toaster	Electric Mixer	Toaster Oven	Food Processor
Northeast	19.8%	22.4%	26.0%	23.8%	19.1%	30.0%	30.0%
North Central	29.0	30.0	24.9	31.3	28.1	17.8	18.3
South	35.2	32.9	36.1	28.1	31.5	31.1	28.3
West	15.9	14.7	13.0	16.9	21.3	21.1	23.3

	Electric Can opener	Full-sized Vacuum	Hair Dryer
Northeast	25.7%	20.9%	23.7%
North Central	16.0	25.1	23.7
South	44.4	33.5	33.5
West	13.9	20.4	19.2

Source: HFD-January 14, 1985.

Household Income of Purchasers

Households with annual incomes of $40,000 or more represented 23% of housewares purchasers according to the survey. The percentage of households in this income bracket is highest among those that purchased food processors, with the average income of those purchasing that product at $31,970.

Average Annual Household Income of Housewares Purchasers-Winter 1985

	Average Annual Household Income
Food processor	$31,970
Iron	29,350
Hair dryer	27,890
Toaster-oven	27,680
Coffee maker	27,400
Electric can opener	26,960
Electric mixer	26,600
Full-sized vacuum	26,240
Microwave cookware	26,080
Toaster	25,520

Source: HFD-September 9, 1985.

Appliance Purchases by Store Type

Catalog stores (such as Sears) and appliance/T.V. stores are the two principal retail outlets for the purchase of major appliances in 1985. The 13th Annual Consumer Survey conducted for Merchandising magazine by Home Testing Institute reports on what stores consumers would be most likely to buy in. One of the above store types or the other was the predominant outlet for the ten major appliance categories reported here with one exception. Catalog stores were the most popular choice for the purchase of microwave ovens, dishwashers, trash compactors, washers, dryers, and freezers while appliance/T.V. stores led in the purchase of ranges, air conditioners, and freezers. The one exception was the case of disposer purchases, with builders/remodelers leading as the primary choice.

Distribution of Appliance Purchases by Store Type, 1985

	Microwave Oven	Range	Dishwasher	Trash Compactor	Disposer
Appliance/T.V. store	26.6%	26.9%	26.0%	21.4%	10.2%
Builder/Remodeler	2.1	16.2	18.5	9.5	30.8
Catalog store (Sears, etc.)	28.1	21.1	28.3	38.1	19.4
Department store	6.9	4.6	2.6	4.8	1.0
Discount store	6.1	2.6	3.6	2.4	6.7
Microwave specialty store	6.1	--	--	--	--
Received as gift	10.4	2.3	2.6	2.4	1.6
Other	13.7	26.3	18.4	21.4	30.3

	Washer	Dryer	Air Conditioner	Refrigerator	Freezer
Appliance/T.V. store	31.9%	30.8%	27.8%	33.4%	28.3%
Builder/Remodeler	2.2	2.4	4.9	6.1	--
Catalog store (Sears, etc.)	39.8	39.2	27.5	28.9	39.1
Department store	7.5	8.1	4.7	6.9	5.0
Discount store	2.9	2.8	4.4	3.4	5.5
Microwave specialty store	--	--	--	--	--
Received as gift	2.9	2.8	5.7	3.2	3.8
Other	12.8	13.9	25.0	18.1	18.3

Source: Merchandising magazine
13th Annual Consumer Survey,
September 1985.

FAIRCHILD FACT FILES CURRENTLY AVAILABLE

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now--1985 Edition will be available in February, 1986)

DEPARTMENT STORE SALES: (Including selected major apparel specialty store sales) Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1984 Edition available now--1985 Edition will be available in January, 1986)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. (1984 Edition available now--1985 Edition will be available in August, 1985).

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: (Including Tailored Casual Wear) Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (November)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and physical fitness.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons are made with findings in the last previous census, covering operations in 1977. (December)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (August)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C 3400-1.80-UA

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

Men's Tailored Clothing, Separates and Rainwear

Including Tailored Casual Wear

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

TABLE OF CONTENTS

Page

MARKET TRENDS.. 1

AT THE MANUFACTURER LEVEL:
- GENERAL INDUSTRY STATISTICS.......................... 2
  - EMPLOYMENT & EARNINGS.............................. 4
  - CONCENTRATION IN THE INDUSTRY...................... 5
- PRODUCTION... 9
  - BY FABRIC..10
  - MATERIALS CONSUMED IN PRODUCTION...................12
  - SEASONAL PATTERNS IN PRODUCTION....................13
- PRODUCT SHIPMENTS....................................14
- PRODUCER PRICES......................................18
- FOREIGN TRADE..19
  - IMPORTS..20
  - EXPORTS..21

AT THE RETAIL LEVEL:
- THE POTENTIAL MARKET.................................23
- RETAIL SALES...26
  - BY PRODUCT...27
  - BY STORE TYPE......................................29
- RETAIL ADVERTISING...................................32
- CONSUMER PRICE INDEX.................................33
- CONSUMER BUYING HABITS...............................33

SCHEDULE OF ADDITIONAL FACT FILES......................35

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1985 by Fairchild Publications
Division of Capital Cities Media, Inc.
All Rights Reserved.
Standard Book Number: 87005-527-5
Printed in the United States of America

MEN'S TAILORED CLOTHING SEPARATES & RAINWEAR

Market Trends

The several consecutive years of decline at the manufacturing level in the men's tailored clothing industry experienced a brief respite in 1984 with employment, production, and domestic shipments all registering increases for the year. However, as 1985 progresses, the industry is returning to its long term trend of decline. Over the first five months of 1985, employment and unit production have recorded declines.

The major problem facing manufacturers in the men's tailored wear industry, as with almost all areas of the apparel industry, are imports from low-cost, developing countries. According to the International Trade Administration (U.S. Department of Commerce), the percentage of imports to new supply in the men's & boys' suit and coat industry skyrocketed from 17.2% in 1982 to 22.3% in 1984, on a current dollar basis. In 1984 alone, the Census Bureau reported that the value of imports in the men's tailored wear industry jumped 35.1%, while on a unit basis, the increase was 26.0%. The major reasons for the continued growth of imports in this segment of the apparel industry are the high-labor intensiveness, and thus the significant cost differences in developing countries and the continued strength of the U.S. dollar.

At the retail level, sales of men's tailored wear increased in every measured category in 1984 according to estimates from Kurt Salmon Associates, a New York based consulting firm. This company estimates that sales in all categories, except rainwear, will increase in 1985, with rainwear remaining even. However, industry analysts say that not all segments of the industry are sharing equally in the gain. Better-priced merchandise is reported to be selling at much better rates than either moderate or popular-priced goods.

Another recent trend on the retail side of the men's tailored wear industry is an attempt by some department stores to reassert themselves in the suit market. After several years of relegating the tailored wear market to discounters, mass merchants and specialty stores, some department stores are now reentering the tailored clothing market although on a smaller scale with a limited number of brands and designers. They are also developing their own private label programs. At the upper-priced end of the tailored wear industry, department stores remain the dominating outlet and show no signs of relinquishing this business.

The trend of wearing sports coats and slacks in situations where suits had been the norm is continuing. As a result, the recessionary period of the early 1980's has had a dramatic effect on the industry. More consumers in 1985 are purchasing sports coats and slacks as an alternative to a tailored suit than ever before due to lower expenses and a greatly increased public acceptance.

Rainwear sales remain heavily dependent on weather conditions throughout the country, so the industry fluctuates greatly. In recent years, many manufacturers, particularly brand name ones, have attempted to stimulate sales through heavy promotions. While many manufacturers feel that these types of programs are disruptive to the industry, others feel that in light of the volatility of the industry, a high degree of promotion is required to keep sales up and inventories in line.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

An overview of trends in the tailored clothing industry--based on the main segments which include coats, suits and separate trouser producers--is published by the International Trade Administration.

Trends in Components of the Men's & Boys' Tailored Clothing Industry
(Compound Annual Rate of Growth)

	Suits & Coats		Separate Trousers	
Industry Data	1972-82	1977-82	1972-82	1977-82
Value of shipments (current $)	2.5%	2.0%	2.3%	4.9%
Value of shipments (1972 $)	-3.3	-3.7	-3.7	-0.8
Total employment	-4.9	-5.3	-4.7	-4.4
Production workers	-4.9	-5.4	-5.0	-4.5
Average hourly earnings	6.1	6.0	7.8	7.2
Capital expenditures	0.9	-0.9	5.0	9.6
Trade Data				
Value of imports	16.2	12.5	nr	nr
Import/new supply ratio	10.9	9.5	nr	nr
Value of exports	20.3	43.6	7.6	23.5
Export/shipment ratio	16.6	42.5	5.8	18.3

nr not reported.

Source: U.S. Department of Commerce,
International Trade Administration,
1985 U.S. Industrial Outlook.

The ITA estimated industry shipments (which includes all products--both primary and secondary--made within an industry classification plus miscellaneous receipts) in 1984 at $3.2 billion in the men's and boys' suit and coat industry and $2.5 billion in the separate trouser industry.

Estimated Value of Industry Shipments In Men's & Boys' Tailored Wear, 1983, 1984
(In millions of dollars)

	Current Dollars		Constant (1972) Dollars		% Change 1984/83	
	1984	1983	1984	1983	Current Dollars	Constant Dollars
Suits & coats (SIC 2311*)	$3,232	$3,040	$1,725	$1,657	+ 6.3%	+ 4.1%
Separate trousers (SIC 2327)	2,505	2,236	1,375	1,231	+12.0	+11.7

* See footnotes following the next table.

Source: U.S. Department of Commerce,
International Trade Administration,
1985 U.S. Industrial Outlook.

GENERAL INDUSTRY STATISTICS

The U.S. Bureau of the Census conducts a complete census of U.S. manufacturers every five years, in those years ending in "2" and "7". Selected results of the 1982 census, released in early 1985, are summarized below.

In all three groups, which make up the men's & boys' tailored wear industry, the number of companies in the industry decline by about one-third between 1977 and 1982. As most operations in this industry are small, with only one or two plants, the number of establishments dropped by a similar percentage during this period.

Men's & Boys' Suits & Coats (SIC 2311*)

	1982	1977	% Change 1982/1977
Number of companies	443	619	- 28.4%
Number of establishments**	528	737	- 28.4
Payroll (mil. $)	$ 876.7	$ 822.2	+ 6.6
Value added by manufacture# (mil. $)	$1,681.2	$1,574.4	+ 6.8
Value of shipments ## (mil. $)	$3,059.7	$2,767.5	+ 10.6
Capital expenditures, new (mil. $)	$ 24.6	$ 25.8	- 4.7

Men's & Boys' Separate Trousers (SIC 2327*)

	1982	1977	% Change 1982/1977
Number of companies	269	404	- 33.4%
Number of establishments**	356	514	- 30.7
Payroll (mil. $)	$ 564.9	$ 474.0	+ 19.2
Value added by manufacture# (mil. $)	$1,111.2	$ 845.6	+ 31.4
Value of shipments ## (mil. $)	$2,165.4	$1,718.0	+ 26.0
Capital expenditures, new (mil. $)	$ 35.7	$ 22.8	+ 56.6

Waterproof Outer Garments (SIC 2385*)

	1982	1977	% Change 1982/1977
Number of companies	98	155	- 36.8%
Number of establishments**	112	167	- 32.9
Payroll (mil. $)	$ 101.1	$ 89.4	+ 13.1
Value added by manufacture# (mil. $)	$ 246.0	$ 194.4	+ 26.5
Value of shipments ## (mil. $)	$ 449.2	$ 348.8	+ 28.8
Capital expenditures, new (mil. $)	$ 0.9	$ 1.6	- 43.8

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC) determined by the principal product made, as shown on the following page.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

SIC 2311 comprises establishments primarily engaged in manufacturing men's, youth's, and boys' suits, coats and overcoats, as well as tailored dress and sportcoats. Establishments primarily engaged in manufacturing uniforms (military, policemen's, firemen's, etc.) are also included. Those manufacturers engaged primarily in making work and sport garments are not included.

SIC 2327 comprises establishments primarily engaged in manufacturing men's youth's and boys' separate slacks and trousers.

SIC 2385 comprises establishments primarily engaged in manufacturing raincoats from purchased rubberized fabrics and other waterproof outer garments made from such material as pliofilm and cellophane. The industry includes manufacturers of garments for men, women and children.

** Each business location is counted as a separate establishment.

Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes, the best value of measure of individual industries.

Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales). The total value of specific products shipped by both those classified in the industry (primary producers) and by secondary producers (who are classified in other industries) is covered in the section on PRODUCT SHIPMENTS.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982.

Employment & Earnings

While employment in the men's and boys' suit segment has been on the rise between 1982 and 1984, employment in the separate trousers segment of the industry, which has been declining since 1977, registered an increase in 1984. According to data from the Bureau of Labor Statistics, 72,100 persons were employed in the men's & boys' suit & coat segment in 1984 while 65,600 worked in the men's separate trousers area.

As 1985 progresses, however, it appears that the trend toward declining employment in both groups is continuing. Between August 1984, and August 1985, the number of employees in the men's & boys' coat and suit industry fell 5.0%, while the number in the separate trousers group was off 2.5% during the same period.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

The decline in employment which the men's tailored wear industry has experienced and continues to experience bodes poorly for domestic manufacturers. As with most other areas of the apparel industry, tailored wear is highly labor intensive. As manufacturing moves to lower cost developing countries with the resultant rise in imports, the domestic industry continues to spiral downward. Thus, the decline in employment registered in the first few months of 1985 is a probable harbinger of further decline for the industry throughout 1985.

Employment & Earnings of Selected Men's & Boys' Tailored Wear Industries

	August Average			Annual Average		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Men's & boys' suits & coats:						
All employees (thous.)	68.2	71.8	- 5.0%	72.1	70.4	+ 2.4%
Production workers (thous.)	59.6	63.0	- 5.4	63.2	61.5	+ 2.8
Average weekly earnings	$224.40	$241.19	- 7.0	$238.1	$221.7	+ 7.3
Average weekly hours	34.0	36.6	- 7.1	36.5	35.7	+ 2.2
Average overtime hours	0.6	1.3	-53.8	1.1	0.7	+57.1
Men's & boys' separate trousers:						
All employees (thous.)	65.1	66.8	- 2.5	65.6	62.7	+ 4.6%
Production workers (thous.)	57.3	58.4	- 1.9	57.1	54.4	+ 5.0
Average weekly earnings	$193.04	$188.86	+ 2.2	$191.8	$184.7	+ 3.8
Average weekly hours	36.7	36.6	- 0.3	37.0	36.8	+ 0.5
Average overtime hours	1.4	1.1	+27.3	1.2	1.3	- 7.7

Source: U.S. Bureau of Labor Statistics, *Employment & Earnings*.

Concentration in the Industry

As was previously mentioned, the vast majority of companies in the men's tailored clothing industry are small operations with few plants or employees. According to the 1982 census of manufactures, one out of four suit and coat plants had fewer than 10 employees while in the separate trousers and waterproof outergarment segments, one in five fits this category. In the waterproof outergarment only two different categories, suit and coat groups, better than half of all plants employ less than 50 workers. In the separate trousers area, the total was about 45%. Still to be released by the Census Bureau are reports on a firm (as opposed to establishment) basis.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Despite their small number, large plants (with more than 250 employees) account for a major share of industry shipments. In 1982, only 18% of all plants fit into this category, yet the Census Bureau reports these plants accounted for about 60% of shipments. Likewise, in the separate trousers category, 21.6% of the plants employed 250 or more workers yet these same plants represent 60% of industry shipments.

The Men's Tailored Wear Industry by Employment Size, 1982

	Establishments		Employees		Shipments	
	Number	Percent	Thous.	Percent	Mil. $	Percent
Men's & boys' suits & coats, total	528	100.0%	75.0	100.0%	$3,059.7	100.0%
By establishment size:						
Under 10 employees	128	24.2	0.5	0.7	66.4	2.2
10 - 49 employees	138	26.1	3.4	4.5	359.4	11.7
50 - 249 employees	168	31.8	21.3	28.4	866.9	28.3
250 or more employees	94	17.8	49.8	66.4	1,767.1	57.8
Separate trousers, total	356	100.0	56.9	100.0	2,165.4	100.0
By establishment size:						
Under 10 employees	68	19.1	0.3	0.5	31.5	1.5
10 - 49 employees	62	17.4	1.6	2.8	190.7	8.8
50 - 249 employees	149	41.9	21.0	36.9	639.6	29.5
250 or more employees	77	21.6	34.0	59.8	1,303.6	60.2
Waterproof outergarments, total	112	100.0	9.3	100.0	449.2	100.0
By establishment size:						
Under 10 employees	20	17.9	(D)	--	(D)	--
10 - 49 employees	50	44.6	1.3	14.0	75.4	16.8
50 - 249 employees	30	26.8	3.1	33.3	167.2	37.2
250 or more employees	12	10.7	(D)	--	(D)	--

(D) Withheld to avoid disclosure.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982.

According to estimates in Sales & Marketing Management magazine's Survey of Buying Power, 1984, plants with 100 or more employees in 1984 accounted for 89% of industry shipments in the suit and coat industry that year. In the separate trousers area, plants of the same size represented 93% of industry shipments while in the waterproof outergarment area they were responsible for 73% of shipments.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Employment & Share of Shipments in Large Plants in the Men's Tailored Apparel Industry, 1984

	Number of Plants		% of Industry Shipments
	With 20+ Employees	With 100+ Employees	Accounted For By Plants With 100 or More Employees
Men's & boys' suits & coats (SIC 2311*)	428	232	89%
Men's & boys' separate trousers (SIC 2327*)	362	264	93
Waterproof outer garments (SIC 2385*)	105	37	73

* For a definition of SIC codes, see page 3.

Source: Sales and Marketing Management,
"Survey of Industrial Power",
April, 1985.
All rights reserved.

By Region

New York remained the leader in the number of manufacturing facilities in 1982 in all three segments of the men's tailored wear industry. However, between 1977 and 1982, the only area in which New York increased its share of the total number of plants was in men's and boys' suits and coats. In this group, New York's share of plants climbed from 23.6% in 1977 to 25.3% in 1982 compared with declines from 20.0% to 16.0% in separate trousers and 37.1% to 21.4% in waterproof outergarments during this same period.

When the percentage of industry shipments accounted for by each state is examined, New York is the leader in only one category: waterproof outergarments. In the suits category, Pennsylvania was the leading state in industry shipments, representing 22% of the total while in the separate trousers industry, Texas was the leading state for shipments, carrying 23% of the total.

GENERAL INDUSTRY STATISTICS

By Region

Leading Manufacturing States in The Men's Tailored Clothing Industry, 1982

	No. of Establishments		Value Added by Manufacture (Mil. $)	Value of Shipments (Mil. $)
	Total	With 20+ Employees		
Men's & boys' suits & coats (SIC 2311*)				
U.S. total	528	343	$1,681.2	$3,059.7
Leading states:				
New York	134	57	211.5	375.7
Pennsylvania	95	72	380.3	672.1
California	40	23	53.0	82.2
Massachusetts	36	25	189.0	363.6
New Jersey	29	19	57.5	83.0
Georgia	25	22	121.6	259.9
Maryland	22	15	83.6	190.2
Leading states total	381	233	1,096.5	2,026.7
Percent of U.S. total	72.1%	67.9%	65.2%	66.2%
Men's & boys' separate trousers (SIC 2327*)				
U.S. total	356	268	$1,111.2	$2,165.4
Leading states:				
New York	57	25	69.5	197.2
Georgia	47	44	174.7	322.2
Pennsylvania	34	25	60.1	89.4
California	31	8	12.1	23.1
Texas	24	22	201.9	498.6
Alabama	23	22	(D)	(D)
Leading states total	216	146	na	na
Percent of U.S. total	60.6%	54.5%	--	--
Waterproof outergarments (SIC 2385*)				
U.S. total	112	76	$ 246.0	$ 449.2
Leading states:				
New York	24	16	23.3	62.9
Massachusetts	12	9	22.4	32.7
Maryland	11	10	(D)	(D)
New Jersey	9	6	11.9	23.4
Georgia	6	5	7.9	14.6
Florida	5	5	5.4	10.5
Leading states total	67	51	na	na
Percent of U.S. total	59.8%	67.1	--	--

* For definitions of SIC codes see page 4.
(D) Withheld to avoid disclosure.
na not available

Source: U.S. Bureau of the Census, *Census of Manufactures, 1982*, MC82-I-23A; MC82-I- 23D.

PRODUCTION

Unit production in the men's and boys' tailored wear industry, which had been on the decline for several years, registered a brief upturn in 1984, according to information from the U.S. Census Bureau. Overall, total unit production increased 8.4% in 1984, rising to 158.7 million units in that year. However, monthly data from the Census Bureau indicates that in 1985 the decline in production in the industry has resumed. None of the four major categories registered an increase in production during the first five months of 1985 versus 1984 with the largest decline for men's suits, off by 20.2%.

During the full year 1984, two overall categories registered declines in production. Overcoats, topcoats, and tailored suburban/car coats recorded a decline of 10.2%, falling to 1.8 million units; the separate vests group marked a decline to 1.3 million units, down 5.2% for the year.

Data from the Current Industrial Reports on production of men's and boys' tailored clothing is summarized below, as compiled by the Census Bureau through surveys among manufacturers, government contractors, and jobbers. Not included are very small producers (generally less than five employees). These are, however, included in the complete 1982 census of manufactures.

The current data covered in the CIR series also includes garments which were cut in the U.S. and sent outside the country and then reimported as finished garments, under provisions of Item 807.00 on the tariff schedule.

Production of Men's Tailored Clothing & Rainwear, 1983, 1984
(Thousands of units)

	1984	1983	% Change 1984/1983
Tailored clothing	158,706	146,468	+ 8.4%
Tailored suits, incl. uniforms	11,994	10,873	+ 10.3
Trios	161	231	- 30.3
Uniform suits	152	177	- 14.1
Overcoats, topcoats & tailored suburban & car coats, incl. uniform	1,768	1,968	- 10.2
Uniform coats	238	239	- 0.4
Tailored suit-type dress & sportcoats, incl. uniform	20,656	19,216	+ 7.5
Uniform coats & jackets	1,233	1,340	- 8.0
Separate vests, exc. sweater vests	1,323	1,395	- 5.2
Separate dress & sport trousers, incl. uniform	122,965	113,016	+ 8.8
Uniform	5,394	5,608	- 3.8
Men's & boys' raincoats, incl. uniform	3,173	2,896	+ 9.6

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(84)-1
(July 1985).

PRODUCTION

Explanation of Terms:

Tailored uniform suits:
Includes military, guards, band, police, fire, etc. Nontailored worktype suits, such as delivery drivers and gas station attendants are included in other categories.

Trios:
Includes tailored suits with a matching and contrasting pair of pants.

Overcoats, topcoats & tailored suburban, car & stormcoats:
Includes only tailored items including uniform, reversible, zipper-lined, fingertip, and wool water-repellent coats, excludes raincoats.

Raincoats:
Includes waterproof outercoats and water-repellent coats of cotton and man-made fibers including uniforms.

Separate vests including uniform:
Includes vests not part of suits, excludes sweater vests.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(84)-1
(July 1985).

By Fabric

Man-made and chiefly man-made fiber fabrics remain the primary type in every measured category of men's tailored wear and rainwear in 1984 according to the results of the 1984 CIR on men's & boys' apparel production.

In three of the six measured categories, however, natural fiber fabrics were the fastest growing group between 1983 and 1984. In the suits, sportcoats, and separate vests categories, cotton or wool fabrics were seen growing the fastest. Man-made fibers had the highest growth rates in the overcoats, raincoats and separate trousers groups.

Production of Reported Categories of Men's Tailored Wear
By Fabric, 1983, 1984
(Thousands of units)

	1984	1983	% Change 1984/1983
Tailored suits, including uniform	11,994	10,873	+ 10.3%
By fabric:			
All cotton & chiefly cotton	331	148	+123.6
Man-made/wool blends, chiefly man-made	4,453	3,960	+ 12.4
All man-made & chiefly man-made except man-made/wool blends	3,215	3,109	+ 3.4
All wool & chiefly wool	3,114	2,834	+ 9.9
All other fabric	377	331	+ 13.9
Fabric, n.s.k.	504	491	+ 2.6

(continued)

PRODUCTION

By Fabric

Production of Reported Categories of Men's Tailored Wear By Fabric, 1983, 1984

(Thousands of units)
(continued)

	1984	1983	% Change 1984/1983
Overcoats, topcoats and tailored suburban and car coats, including uniform	1,768	1,968	- 10.1
By fabric:			
All man-made & chiefly man-made	741	726	+ 2.1
All wool & chiefly wool	679	701	- 3.1
All other fabric	286	459	- 37.7
Fabric, n.s.k.	62	82	- 24.4
Men's & boys' raincoats, including uniform	3,173	2,896	+ 9.6
Plastic (with or without fabric trim)	1,641	1,566	+ 4.0
Rubberized and/or coated fabric			
Uncoated fabric:			
All cotton & chiefly cotton	27	25	+ 8.0
All man-made & chiefly man-made	1,026	920	+ 11.5
All other fabric	41	46	- 10.9
Fabric, n.s.k.	438	339	+ 29.2
Tailored suit-type dress & sport coats including uniform	20,656	19,216	+ 7.5
By fabric:			
All cotton & chiefly cotton	1,477	890	+ 66.0
Man-made/wool blends, chiefly man-made	5,674	4,544	+ 24.9
All man-made & chiefly man-made except man-made/wool blends	6,228	7,601	- 18.1
All wool & chiefly wool	6,175	4,751	+ 30.0
All other fabric	816	749	+ 8.9
Fabric, n.s.k.	286	681	- 58.0
Separate vests, excluding sweater vests	1,323	1,395	- 5.2
By fabric:			
All cotton & chiefly cotton	222	125	+ 77.6
All man-made & chiefly man-made	874	860	+ 1.6
All wool and chiefly wool	198	66	+200.0
All other fabric	7	18	- 61.1
Fabric, n.s.k.	22	326	- 93.3

(continued)

PRODUCTION

By Fabric

Production of Reported Categories of Men's Tailored Wear
By Fabric, 1983, 1984
(Thousands of units)
(continued)

	1984	1983	% Change 1984/1983
Separate dress & sport trousers, including uniform	122,965	113,016	+ 8.8
By fabric:			
Woven fabric:			
All cotton & chiefly cotton	15,900	15,341	+ 3.6
Man-made/wool blends, cheifly man-made	20,961	14,296	+ 46.6
All man-made & chiefly man-made, except man-made/wool blends	61,176	60,782	+ 0.6
All wool & chiefly wool	8,881	7,419	+ 19.7
All other fabric	7,907	6,077	+ 30.1
Knit fabric:			
All cotton & chiefly cotton	(D)	(D)	--
All man-made & chiefly man-made	6,832	7,186	- 4.9
Fabric, n.s.k.	(D)	(D)	--

n.s.k. not specified by kind.
(D) withheld to avoid disclosure.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(84)-1
(July 1985).

Materials Consumed in Production

Materials Consumed in Production of Men's & Boys' Tailored Clothing, 1977, 1982
(Delivered cost in millions of dollars)

	1982	1977	% Change 1982/1977
Men's & boys' suits & coats, total	$897.7	$846.8	+ 6.0%
Broadwoven fabrics	500.8	445.2	+ 12.4
Purchased knitted fabric	75.3	57.1	+ 31.9
All other materials, components, parts, containers and supplies	184.2	161.5	+ 14.1
Materials, parts, containers & supplies, n.s.k.	137.4	183.0	- 24.9
Men's & boys' separate trousers, total	695.2	658.2	+ 5.6
Broadwoven fabrics	370.9	316.5	+ 17.2
Purchased knitted fabric	119.4	94.5	+ 26.3
All other materials, components, parts, containers and supplies	126.3	111.0	+ 13.8
Materials, parts, containers & supplies, n.s.k.	78.6	136.2	- 42.3

(continued)

PRODUCTION

Materials Consumed in Production

Materials Consumed in Production of Men's & Boys' Tailored Clothing, 1977, 1982

(Delivered cost in millions of dollars)
(continued)

	1982	1977	% Change 1982/1977
Waterproof outergarments, total	$157.1	$105.2	+ 49.3%
Broadwoven fabrics	99.8	51.6	+ 81.1
Purchased knitted fabrics		3.3	
All other materials, components, parts, containers & supplies	35.2	21.7	+ 62.2
Materials, parts, containers & supplies, n.s.k.	22.1	28.6	- 22.7

n.s.k. not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
MC82-I-23A; MC82-I-23D.

Seasonal Patterns in Production

The table below shows the 1983 and 1984 distribution of cuttings by months in specified types of tailored wear, as reported in the Current Industrial Reports.

Men's Tailored Wear
Percent of Years Cuttings by Month, 1983, 1984

	Suits		Overcoats & topcoats		Sport & dress coats		Sport & dress trousers	
	1984	1983	1984	1983	1984	1983	1984	1983
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	9.1	9.0	7.7	7.0	8.0	7.3	8.7	7.4
February	8.8	8.8	7.1	8.3	8.7	7.3	10.5	8.4
March	9.7	8.6	8.3	9.6	9.0	8.6	9.3	9.4
April	8.1	7.2	9.4	7.0	9.3	8.4	8.4	8.5
May	8.6	7.8	9.0	7.2	9.5	8.7	9.2	7.9
June	7.8	7.8	7.4	7.4	9.3	9.8	8.1	9.3
July	6.1	5.3	7.4	5.5	7.3	8.1	6.4	6.5
August	8.9	8.0	8.4	8.1	8.5	9.2	9.0	9.2
September	8.9	8.8	9.4	10.6	8.0	8.6	7.9	8.4
October	8.2	10.2	10.2	12.3	8.6	8.8	8.7	8.9
November	9.5	10.2	8.1	10.0	7.8	8.3	7.7	9.3
December	6.5	8.2	7.7	7.0	6.0	6.9	6.1	6.8

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(85)-1
(July 1985).

PRODUCT SHIPMENTS

Product shipments include all products of a specified type, regardless of the industry classification of the producer, in contrast to industry shipments which cover both primary and secondary products made within a specific industry classification. For reporting purposes under the Census Bureau system, a manufacturer is classified in only one industry based on its primary product.

The International Trade Administration (1985 U.S. Industrial Outlook) has estimated that in "real" terms, based on the value of the 1972 dollar, shipments of men's and boys' coats and suits by all U.S. producers in 1984 gained 19.8% compared with shipments in 1983. In real terms, shipments of men's and boys' separate trousers in the same period were up an estimated 21.4%.

More detailed information on the value of product shipments in the men's tailored wear industry is available from the Census Bureau in the Current Industrial Reports. According to the latest CIR covering the years 1983 and 1984, the only category to register a decline is men's overcoats (-3.1%). Overall, the value of shipments of men's tailored clothing climbed 7.9% in 1984, reaching $4 billion. The fastest growing categories in 1984 were separate vests up 22.7% and dress and sport coats (up 10.3%).

Value of Shipments of Reported Men's Tailored Wear, 1983, 1984
(Millions of dollars)

	1984	1983	% Change 1984/1983
Total, all reported tailored wear	$4,030.3	$3,736.3	+ 7.9%
Tailored suits, including uniform	1,175.2	1,111.2	+ 5.8
Overcoats, topcoats & tailored suburban & car coats, including uniform	103.0	106.3	- 3.1
Men's & boys' raincoats incl. uniform	107.7	105.0	+ 2.6
Tailored suit-type dress & sport coats, including uniforms (men's)	1,060.4	961.1	+10.3
Separate dress & sport trousers, incl. uniform	1,562.9	1,435.5	+ 8.9
Separate vests, excluding sweater vests	21.1	17.2	+22.7

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(84)-1.

PRODUCT SHIPMENTS

The most comprehensive figures on shipments by all producers are covered in the complete census of manufactures, compiled by the Census Bureau every five years. The results of the latest census covering 1982 compared with 1977 are shown below. It must be noted that the census bureau data does not take into account inflation during the period covered which was significant between 1977 and 1982.

Between 1977 and 1982, the value of shipments of men's tailored wear increased 14.8%, reaching a total of $2.8 billion.

Tailored Wear & Rainwear Product Shipments
By All Producers, 1977, 1982

	Value of Shipments (Mil. $)			Quality of Shipments (Thousands of Units)		
	1982	1977	% Change 1982/77	1982	1977	% Change 1982/77
Suits & coats, total	$2,778.6	$2,420.3	+14.8	na	na	--
Men's suits	1,098.1	1,128.8	- 2.7	11,543	17,548	-84.2%
Men's overcoats & topcoats	120.3	194.1	-38.0	2,646	5,735	-53.8
Men's tailored dress & sport coats & jackets	923.7	604.1	+52.9	18,011	16,827	- 7.0
Contract work on men's & boys' suits & coats	493.6	371.5	+32.9	na	na	--
Men's & boys' suits, coats & overcoats, n.s.k.	142.9	121.8	+17.3	na	na	--
Separate trousers, total	1,965.2	1,540.6	+27.6	na	na	--
Men's separate dress & sport trousers	1,411.2	1,217.5	+15.9	115,117	121,984	- 5.6
Contract work on men's & boys' separate trousers	462.2	264.5	+74.7	na	na	--
Separate trousers, n.s.k.	91.8	58.6	+56.7	na	na	--
Waterproof outergarments, total	187.0	158.1	+18.3	na	na	--
Men's & boys' raincoats	116.5	105.0	+11.0	2,979	5,340	-44.2
Contract work on raincoats	37.5	25.8	+45.3	na	na	--
Raincoats, n.s.k.	33.0	27.3	+20.9	na	na	--

n.s.k. not specified by kind.
na not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
MC82-I-23A; MC82-I-23D.

PRODUCT SHIPMENTS

By Geographic Region

Pennsylvania was the leading state for shipments in four of the seven categories of men's tailored clothing measured by the Census Bureau in 1982. The only category in which the leading state in 1982 differed from 1977 was the overcoats and topcoats group where Pennsylvania climbed from third position to surpass New York and Massachusetts for the top spot.

The only categories in which Pennsylvania was not the leading state for shipments were separate dress and sport trousers (Texas), commission work on dress & sport trousers (California) and waterproof outergarments (Maryland).

Value of Product Shipments of Tailored Wear and Rainwear
By Leading State, 1977, 1982
(Millions of dollars)

	Value of Shipments		% Change
	1982	1977	1982/1977
Men's suits, including leisure & uniform			
U.S. total	$1,078.6	$1,273.4	- 15.3%
Leading states:			
Pennsylvania	232.2	274.3	- 15.3
New York	161.6	248.1	- 34.9
Ohio	140.3	75.5	+ 85.8
Georgia	124.0	96.8	+ 28.1
Massachusetts	98.7	100.1	- 1.4
Leading states total	756.9	794.8	- 4.8
Percent of U.S. total	70.1%	62.4%	--
Men's overcoats & tailored car coats			
U.S. total	126.1	179.8	- 29.8
Leading states:			
Pennsylvania	25.9	16.7	+ 55.1
Massachusetts	22.3	37.6	- 40.7
New York	21.1	18.7	+ 12.8
Minnesota	6.2	14.8	- 58.1
Leading states total	75.5	87.8	- 14.0
Percent of U.S. total	59.6%	48.8%	--
Men's tailored dress & sport coats & jackets			
U.S. total	944.0	623.0	+ 51.5
Leading states:			
Pennsylvania	216.1	179.5	+ 20.3
Texas	124.2	na	--
Massachusetts	122.4	63.6	+ 92.4
Georgia	78.6	27.8	+182.7
Ohio	77.2	27.3	+182.8
Maryland	76.7	20.1	+281.6
Leading states total	695.2	na	--
Percent of U.S. total	73.6%	na	--

PRODUCT SHIPMENTS

By Geographic Region

Value of Product Shipments of Tailored Wear and Rainwear By Leading State, 1977, 1982

(Millions of dollars)
(continued)

	Value of Shipments		% Change
	1982	1977	1982/1977
Commission work on men's & boys' suits & coats			
U.S. total	$ 493.6	$ 371.5	+ 32.9%
Leading states:			
Pennsylvania	89.2	72.9	+ 22.3
New York	63.4	55.6	+ 14.0
Georgia	55.7	48.3	+ 15.3
Tennessee	47.8	19.3	+147.7
New Jersey	38.4	20.7	+ 85.5
Leading states total	294.5	216.8	+ 35.8
Percent of U.S. total	59.7%	58.4%	--
Men's & boys' separate dress & sport trousers			
U.S. total	1,588.9	1,308.3	+ 21.4
Leading states:			
Texas	305.4	246.7	+ 23.8
Georgia	208.8	151.1	+ 38.2
New York	154.1	168.1	+ 8.3
Tennessee	148.2	98.3	+ 50.8
Missouri	83.9	16.6	+405.4
Leading states total	900.4	680.8	+ 32.3
Percent of U.S. total	56.7%	52.0%	--
Commission work on men's & boys' dress & sport trousers			
U.S. total	426.7	264.5	+ 61.3
Leading states:			
California	70.5	51.3	+ 37.4
Texas	69.6	8.9	+682.0
Alabama	63.0	35.1	+ 79.5
Pennsylvania	49.1	36.1	+ 36.0
Mississippi	36.3	21.8	+ 66.5
Leading states total	288.5	153.2	+ 88.3
Percent of U.S. total	67.6%	57.9%	--

(continued)

PRODUCT SHIPMENTS

By Geographic Region

Value of Product Shipments of Tailored Wear and Rainwear
By Leading State, 1977, 1982
(Millions of dollars)
(continued)

	Value of Shipments 1982	Value of Shipments 1977	% Change 1982/1977
Raincoats & other waterproof outerwear			
U.S. total	$ 357.0	na	--
Leading states:			
Maryland	133.9	na	--
New York	53.7	na	--
Massachusetts	24.2	na	--
Florida	8.3	na	--
California	2.5	na	--
Leading states total	222.6	na	--
Percent of U.S. total	62.4	na	--

na not available.

Source: U.S. Bureau of the Census, Census of Manufactures, 1982, MC82-I-23A; MC82-I-23D.

PRODUCER PRICES

Between August 1984, and August 1985, three categories of the men's & boys' tailored clothing industry recorded declines in their producer (factory) price index. Overall, only four of the 11 categories recorded changes less than the 1.1% decline in men's and boys' wear price levels. The largest decline between August 1984 and 1985 was for cotton trousers, except uniform (-11.0%).

Producer Price Indexes for Selected Types of
Men's Tailored Wear
(12/80=100, unless otherwise specified)

	August Average			Annual Average		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Apparel (1967=100)	204.7	201.0	- 1.8%	201.1	197.4	+ 1.9%
Men's & boys' wear (1967=100)	230.8	228.3	+ 1.1	227.4	222.4	+ 2.2
Regular weight suits of wool or wool blends	127.3	121.1	+ 5.1	122.7	na	--
Regular weight suits of cotton or cotton blends	127.2	118.9	+ 7.0	120.2	116.1	+ 3.5

(continued)

Producer Price Indexes for Selected Types of Men's Tailored Wear
(12/80=100, unless otherwise specified)
(continued)

	August Average			Annual Average		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Regular weight suits of other fabrics	110.4	110.1	+ 0.3%	110.0	na	--
Light weight suits of cotton or cotton blends	118.3	114.2	+ 3.6	114.3	na	--
Light weight suits of other fabrics	122.3	114.0	+ 7.3	116.0	na	--
Trousers, exc. uniform of cotton (12/81=100)	92.2	103.6	-11.0	103.7	101.8	+ 1.9
Trousers, exc. uniform of wool (12/81=100)	107.1	104.8	+ 2.2	104.7	103.7	+ 1.0
Trousers, exc. uniform of other fabrics (12/81=100)	106.2	106.6	- 0.4	106.4	104.6	+ 1.7
Business-type sport coats of wool or wool blends	124.9	120.2	+ 3.9	120.1	na	--
Business-type sport coats of cotton or cotton blends	121.0	118.0	+ 2.5	116.3	na	--
Business type sport coats of other fabrics	115.0	115.4	- 0.3	112.9	110.2	+ 2.5

na not available

Source: U.S. Bureau of the Labor statistics.

FOREIGN TRADE

Imports continue to spiral in the men's and boys' tailored and rainwear industries as in most other segments of the apparel industry, due primarily to the cost advantages of lower labor costs in developing countries and the unprecedented strength of the U.S. dollar.

Imports of men's and boys' suits in 1984 accounted for 22% of new supply, up from 17% in 1982. During this same period, exports of suits as a percent of shipments declined from 1.3% to 0.6%.

FOREIGN TRADE

Selected Men's & Boys' Tailored Wear Industry Supply Situation, 1982-1984

(Value in millions of dollars)

	Men's & Boys' Suits & Coats			Men's & Boys' Separate Trousers		
	1984	1983	1982	1984	1983	1982
Value of imports	$888.0	$660.2	$613.3	na	na	na
Imports as a % of new supply	22.3%	18.5%	17.2%	na	na	na
Value of exports	$ 16.0	$ 17.2	$ 31.8	$62.0	$42.9	$44.6
Exports as a % of shipments	0.6%	0.7%	1.3%	3.0%	2.5%	2.6%

na not available

Source: 1985 U.S. Industrial Outlook,
International Trade Administration.

Imports

According to the U.S. Bureau of the Census, the value of imports of all reported categories of men's and boys' tailored clothing and rainwear in 1984 increased 35.1% over the previous year, reaching a total of $1.7 billion. In terms of units the increase between 1983 and 1984 was 26% climbing to a total of 17 million dozen.

The fastest growing category in 1984 in terms of both units and dollars was wool coats except suit type. This category more than doubled the value of its imports as well as the quantity of its imports in the one year period. The only other group which doubled both its value and quantity in 1984 was man-made suit type sport coats and jackets.

Not one category of men's tailored clothing or rainwear registered a decrease in the value or quantity of its imports in 1984 according to the Census Bureau.

Summary of U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear, 1984, 1983

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Millions of $)		% Change
	1984	1983	1984/1983	1984	1983	1984/83
Total reported categories	17,002.5	13,489.4	+ 26.0%	$1,701.6	$1,259.1	+ 35.1%
Suits, total	423.5	259.3	+ 63.3	218.4	138.1	+ 58.1
Wool	214.5	136.0	+ 57.7	149.3	98.4	+ 51.7
Man-made	209.0	123.3	+ 69.5	69.1	39.7	+ 74.1
Suit-type sport coats & jackets, total	683.9	434.8	+ 57.3	170.7	105.5	+ 61.8
Wool	181.0	107.5	+ 68.4	71.2	41.3	+ 72.4
Cotton	234.0	195.0	+ 20.0	43.6	36.9	+ 18.2
Man-made	268.9	132.3	+103.3	55.9	27.3	+104.7

(continued)

FOREIGN TRADE

Imports

Summary of U.S. Imports of Men's & Boys' Tailored Clothing & Rainwear, 1984, 1983
(continued)

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Millions of $)		% Change
	1984	1983	1984/1983	1984	1983	1984/83
Trousers**, total	11,941.2	10,372.1	+ 15.1	778.9	599.3	+ 30.0
Wool	283.8	274.5	+ 3.4	56.5	46.2	+ 22.3
Cotton	6,463.2	6,058.1	+ 6.7	424.8	368.3	+ 15.3
Man-made	5,239.2	4,039.5	+ 29.7	297.6	184.8	+ 61.0
Coats, excl. suit-type						
total	3,870.8	2,382.1	+ 62.5	502.7	369.2	+ 36.2
Wool	111.9	47.2	+137.0	45.5	20.0	+127.5
Cotton	1,109.6	985.6	+ 12.6	140.8	116.6	+ 20.8
Man-made	2,649.3	2,349.3	+ 12.8	316.4	259.6	+ 21.9
Raincoats	83.1	41.1	+102.1	30.9	20.0	+ 54.5

* The C.I.F. value is based upon the purchase price and includes all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

** This category also includes slacks and shorts made from these fibers.

Source: U.S. Bureau of the Census,
U.S. General Imports.
FT 135, December 1983, 1984.

Exports

Exports of most types of men's & boys' tailored clothing registered an increase in 1984. Suits and raincoats, however, recorded declines in exports in 1984 versus 1983. Suits were off 16.4% in quantity and 27.6% in value; raincoats fell 23.4% in quantity and 10.1% in value.

FOREIGN TRADE

Exports

Summary of U.S. Exports of Men's & Boys' Tailored Clothing & Rainwear 1983, 1984

	Quantity (Thous. of Doz.)		% Change	Value (C.I.F.)* (Millions of $)		% Change
	1984	1983	1984/1983	1984	1983	1984/1983
Total, all reported categories	na	1,518.3	--	na	$52,488.6	--
Suits, total	28.1	33.6	- 16.4%	$1,932.6	2,668.4	- 27.6%
Knit:						
Cotton	10.3	3.8	+171.1	538.5	592.5	- 9.1
Man-made	7.4	18.4	- 59.8	352.3	851.4	- 58.6
Not knit:						
Wool	0.3	0.4	- 25.0	194.8	165.5	+ 17.7
Cotton	1.9	3.8	- 50.0	187.8	294.3	- 36.2
Man-made	8.2	2.4	+241.6	659.2	406.7	+ 62.1
Suit-type sport coats & jackets, total	73.9	56.8	+ 30.1	4,468.0	2,826.1	+ 58.1
Knit:						
Cotton	35.5	20.8	+ 70.7	1,248.6	572.8	+118.0
Man-made	12.3	13.4	- 8.2	312.7	737.7	- 57.6
Not knit:						
Wool	1.5	1.0	+ 50.0	535.5	370.6	+ 44.5
Cotton	7.7	2.7	+185.2	1,290.7	385.5	+234.8
Man-made	16.9	18.9	- 10.6	880.5	759.5	+ 15.9
Trousers & slacks, total	na	982.4	--	na	30,857.4	--
Knit:						
Cotton	147.8	112.3	+ 31.6	4,956.9	3,424.3	+ 44.8
Man-made	143.2	49.9	+187.0	3,412.5	2,341.3	+ 45.8
Not knit:						
Wool	na	5.3	--	na	278.5	--
Cotton	560.6	467.0	+ 20.0	19,637.4	15,321.1	+ 28.1
Man-made	633.7	347.9	+ 82.2	15,981.6	9,492.2	+ 68.3
Coats & jackets, excl. suit-type, incl. rainwear, total	660.0	437.8	+ 50.8	16,661.8	15,947.4	+ 4.5
Knit:						
Cotton	73.0	61.6	+ 18.5	2,424.5	3,045.9	- 20.4
Man-made	216.1	169.4	+ 27.6	2,368.2	2,909.7	- 18.6
Not knit:						
Wool	5.6	1.6	+250.0	1,248.7	440.6	+183.4
Cotton	25.3	20.2	+ 25.2	4,973.4	3,879.9	+ 28.2
Man-made	340.0	185.0	+ 83.8	5,647.0	5,671.3	- 0.4
Raincoats of textile fabrics, coated, filled or laminated	5.9	7.7	- 23.4	170.1	189.3	- 10.1

(footnotes on following page)

na not available.

* The value is generally equivalent to a F.A.S. (free alongside ship) value at the U.S. port of export. It is based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports-Schedule E,
Commodity by Country FT446,
December 1983, 1984.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

According to the U.S. Census Bureau projections, the number of American males aged 35-54 years will swell to 40.8 million by 2005, a 56.9% increase over 1984. During the same time period, the ranks of males aged 55-64 will continue on an upward spiral and will number approximately 14.0 million in 2005, a jump of 35.5% over 1984. Better than four out of every 10 males will fall into these age brackets in 2005, compared with three out of 10 in 1984.

Population Projections - 1984, 1994, 2005
(Middle Series*)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
Male							
Total, all ages	115,073	125,464	134,297	+ 16.7%	100.0%	100.0%	100.0%
Under 16 years	28,331	30,746	29,723	+ 4.9	24.6	24.6	22.1
16 years & over	86,742	94,718	104,574	+ 20.5	75.4	75.4	77.9
16 - 19	7,653	6,712	8,058	+ 5.3	6.6	5.3	6.0
20 - 34	31,522	29,725	27,416	- 13.0	27.4	23.7	20.4
35 - 54	25,975	35,187	40,769	+ 56.9	22.6	28.0	30.4
55 - 64	10,375	9,793	14,060	+ 35.5	9.0	7.8	10.5
65 & over	11,217	13,300	14,271	+ 27.2	9.7	10.6	10.6
Median age (years)	29.9	33.0	36.0	+ 20.4	--	--	--

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 952 (May 1984).

THE POTENTIAL MARKET

Male Population

The boom in the 35-54 year old category has led this group to become the prime target market for retailers of men's tailored wear. In addition to the shear growth in numbers, this age group has more years of schooling and tend to be in "better" jobs, where tailored clothing is more of the norm. According to the U.S. Bureau of Labor Statistics, better than one out of four males in the labor force now has a college degree, with 33% of 35-54 year olds having one.

This has led marketers of tailored wear to change their merchandise mix to include more updated looks in order to cater to one market which is now in its prime year, and spending proportionally more to make better impressions in the work place.

Male Height/Weight Groups

The following table covers 1983 estimates on the current male population (18-74 years of age) in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services, and the U.S. Census Bureau.

Close to 2.6 million men, 3.3% of the adult male population, stand six feet two inches or taller. At the other end of the spectrum, over 10 million men, 13.6% of males, are under five feet six inches tall. Almost half (47.2%) of men between the ages of 18 and 74 fall within the five feet nine inch and six feet one inch height range.

Estimated Distribution of the U.S. Male Population
By Height/Weight Groups, 1983
(Numbers in thousands)

	Total	Under 5'6"	5'6"-5'8"	5'9"-6'1"	6'2" & Over
Total, 18-74 years	78,116	10,624	28,044	36,870	2,578
Percent	100.0%	13.6%	35.9%	47.2%	3.3%
Weight:					
Under 150 lbs.	17,576	5,312	7,187	4,921	156
Percent	22.5%	6.8%	9.2%	6.3%	0.2%
150-179 lbs.	32,652	3,906	13,826	14,530	391
Percent	41.8%	5.0%	17.7%	18.6%	0.5%
180-199 lbs.	15,389	938	4,687	9,061	703
Percent	19.7%	1.2%	6.0%	11.6%	0.9%
200-229 lbs.	9,374	391	1,952	6,249	781
Percent	12.0%	0.5%	2.5%	8.0%	1.0%
230 lbs. & over	3,125	78	391	2,109	547
Percent	4.0%	0.1%	0.5%	2.7%	0.7%

Source: Fairchild Market Research Dept. based on National Health Survey (U.S. Dept. of Health Education & Welfare) 1979, & U.S. Bureau of Census population projections.

THE POTENTIAL MARKET

Male Height/Weight Groups

One area of men's apparel which has been getting more attention of late has been special sizes such as big and tall, as well as short men. Current estimates for this category are about 10% of total spending for men's wear or about $35 million (including all types of men's apparel).

Most larger retailers have gotten out of the special size business over the last several years with current estimates being that between 80% and 90% of the category sales are now done in specialty stores. The main difficulty seen by larger retail organizations is that the special size departments require two to three times the number of sku's as a conventional department and thus eats up more inventory dollars and valuable floor and storage space. Likewise the department requires constant attention from merchandising personnel which adds to increased costs.

Employment

As previously mentioned, higher educational attainment has led to a higher proportion of males in the labor force to be in better-paying managerial type jobs. Through the recession of 1981 and 1982, managerial employment did not suffer as much as other areas and as the economy continues to gain, so does managerial and professional employment.

Even as the growth of the economy slows to more normal, traditional rates, employment in the managerial and professional category continues to outperform the economy overall.

The growth in middle and upper level management bodes well for the tailored wear as these people are most likely to buy the category. Combined with the move of the baby boom generation into its prime earning years, higher education and growth of the white collar job market, the outlook for the tailored wear industry on the retail level remains bright.

Male Employment by Occupation, 1983, 1984, September 1984, September 1985
(Males 16 years of age & older)
(Numbers in thousands)

	September Average			Annual Average		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
Total male employed	60,397	59,714	+ 1.1%	59,091	56,787	+ 4.1%
Managerial & professonal specialty	15,151	14,547	+ 4.1	14,529	13,933	+ 4.3
Executive, administration & managerial	7,988	7,733	+ 3.3	7,683	7,282	+ 5.5
Professional specialty	7,163	6,814	+ 5.1	6,846	6,651	+ 2.9
Tech., sales & admin. support	11,715	11,714	--	11,556	11,078	+ 4.3
Technicians & related support	1,780	1,650	+ 7.9	1,646	1,582	+ 4.0
Sales occupations	6,554	6,571	- 0.3	6,550	6,201	+ 5.6
Admin. support incl. clerical	3,381	3,493	- 3.2	3,114	3,361	- 7.3
Service occupations	5,673	5,432	+ 4.4	5,545	5,430	+ 2.1
Precision production, craft & repair	12,169	12,008	+ 1.3	11,945	11,328	+ 5.4
Operators, fabricators & laborers	12,697	12,780	- 0.6	12,479	11,809	+ 5.7

Source: U.S. Bureau of Labor Statistics, Employment & Earnings.

RETAIL SALES

Current Trends

As reported in the Softgoods Outlook, 1985, compiled by Kurt Salmon Associates, unit sales increases for all men's wear measured 4.2% in 1984. Sportcoats were up 22%; slacks, + 14%; raincoats, + 16%; suits, + 2%.

Sales projections for 1985 by this source indicate a better rate of gain in suit sales, a lower rate in sales of slacks and sport jackets.

Retail Sales of Selected Men's Apparel Categories
(Percentage change in units purchased by consumers)

	Projected 1985/1984	1984/1983	1983/1982	1982/1981
Men's wear*	+ 3%	+ 4.2%	+ 1.5%	+ 0.5%
Suits	+ 4	+ 2.0	- 2.0	-12.0
Sport jackets	+ 5	+22.0	- 6.0	+13.0
Slacks	+ 8.0	+14.0	+10.0	- 2.0
Rainwear	nr	+16.0	- 2.0	+ 1.0

* Includes types of men's wear not separately listed (funishings, overcoats, etc.)
nr not reported

Source: Kurt Salmon Associates,
The Softgoods Outlook, 1985,
(based on MRCA Panel Data).

The manner in which retailers have been handling their ordering of tailored wear has changed dramatically in the last several years. Traditionally, retailers had placed the bulk of the clothing seasons needs--75% or more--up front, before the season started. Now, the norm has become to place only about 50% of the needs up front and to stay in a more flexible position with regard to finances and inventory control. This allows retailers to adapt more easily to fluctuations in their business.

This change in the buying pattern has led to an increase in discounting by manufacturers and to an increase in the importance of discount chains in the men's tailored industry. Manufacturers are reported to have reduced wholesale prices by as much as 30% in the Spring of 1985 in order to clear their inventories of unsold merchandise.

According to a recent survey, conducted by MPA Research, and published in the Wall Street Journal (2/8/85), the average man in a major city spent $931 on business clothing annually versus $584 for sportswear.

RETAIL SALES BY PRODUCT

Suits

While retail sales of better-priced suits held up well during the recessionary period of the early 1980's, sales of moderate and lower priced suits suffered. Analysts had hoped that after the recession moderate priced sales would recover, however, this does not seem to have happened. While sales of better priced suits continue strong in 1985, the moderate and lower priced categories continue to decline.

The trend towards dressing up in more traditional outfits which has benefitted other segments of the men's tailored wear industry has not been that helpful in the suit segment. The recession of the early 1980's made consumers more cautious and most consumers are still purchasing separates which are cheaper but can function as suits. This does not hold true, however, for upper-priced suits where the customers are more affluent and less concerned about the expenditures for tailored clothing and so more quality conscious.

According to MRCA Information Services, a Stamford, Ct. based consumer research firm, the number of men's suits purchased fell from 27 million in 1980 to 18 million in 1984. This translates into a decline in spending of about $400 million in 1984, compared with 1980.

Sportcoats

Sportcoats have been the most consistant gainers in the men's tailored wear industry over the last several years. Benefitting from the desire of men to dress in more traditional outfits, a trend that had its start in the recessions of the early 1980's, as well as the relative inexpensiveness of the category compared with the alternatives, this category has shown a decline in sales in only one year since 1981.

As is the trend in suits as well as most other segments of the tailored wear industry, the better priced categories have fared better than any other category.

Overcoats & Topcoats

Another area which has been helped by the traditional dress-up trend has been the tailored topcoat. For many years the topcoat industry sales have been highly related to weather conditions. The more severe the winter, the better the sales of topcoats. Over the last two years, however, the topcoat industry has been on the climb.

As with most other areas of the tailored wear industry, better-priced goods are outperforming the moderately-priced lines. Some retailers have reported that sales of men's cashmere topcoats are as much as 40% higher in 1985 than last year.

The number of all men's coats purchased in 1984 was 2 million fewer than in 1980 according to MRCA, with spending $90 million less.

RETAIL SALES BY TYPE OF OUTLET

The U.S. Bureau of the Census has recently released reports on retail sales of specific major merchandise categories by type of retail outlet, based on the complete census of retail trade covering operations in 1982.

Information on total sales of men's and boys' wear in all retail outlets which have a payroll is included in the published census reports. Information on sales of specific types of men's wear is limited to department stores, men's wear stores and family clothing stores. However, these are the major outlets --accounting for over 85% of total men's and boys' wear sales in all types of retail outlets with payroll in 1982.

Total sales of men's tailored and casual wear (as classified in the Census Bureau) in the three major outlet types amounted to $10.3 billion in 1982 and represented 41.2% of total men's and boys' wear business in these three outlet types.

Men's Tailored Clothing/Casual Wear in Leading Outlet Types, 1982
(Includes only stores with payroll)

	Overcoats, Topcoats, Raincoats*				Suits & Formal Wear			
	Stores***		Sales		Stores***		Sales	
	Number	%	Mil. $	%	Number	%	Mil. $	%
Reported total	30,070	100.0	$1,750.3	100.0	22,050	100.0	$2,342.5	100.0
Department stores	6,446	21.4	773.9	44.2	3,816	17.3	542.0	23.1
Men's wear stores	13,124	43.6	579.1	33.1	11,638	52.8	1,489.1	63.6
Family clothing stores	10,500	35.0	397.3	22.7	6,596	29.9	311.4	13.3

	Sportcoats/Blazers				Dress/Casual Slacks & Jeans**			
	Stores**		Sales		Stores***		Sales	
	Number	%	Mil. $	%	Number	%	Mil. $	%
Reported total	23,843	100.0	$1,577.4	100.0	38,266	100.0	$4,672.9	100.0
Department stores	4,606	18.5	531.7	33.7	8,419	22.0	1,751.7	37.5
Men's wear stores	12,164	49.0	809.8	51.3	15,038	39.3	1,417.3	30.3
Family clothing stores	8,073	32.5	235.9	15.0	14,809	38.7	1,503.9	32.3

Contribution to Total Sales of All Men's & Boys' Wear in Reported Retail Outlet Types

	Total Men's & Boys' Wear Sales	Men's Tailored/Casual Wear Sales	
	Mil. $	Mil. $	% of Total Men's & Boys' Wear Sales
Reported total	$25,117.9	$10,343.1	41.2%
Department stores	12,812.0	3,599.3	28.1
Men's wear stoers	7,052.6	4,295.3	55.0
Family clothing stores	5,253.3	2,448.5	41.0

* Outer jackets are also included in this classification.

** Walking shorts are also included.

*** Each store location is separately counted, not just headquarter store locations. Leased departments are not included in the stores in which operated, but are treated as separate establishments in the pertinent kind-of-business classification.

Source: Based on U.S. Bureau of the Census
1982 Census of Retail Trade RC82-1-3.

RETAIL SALES BY STORE TYPE

Department Stores

Reports on merchandise line sales in department stores have been made available in recently-issued reports covering the complete 1982 census of retail trade, compiled by the U.S. Census Bureau. Under the Standard Industrial Classification system followed in government reports, department stores include all outlets meeting the definition by store size and merchandise handled, including discount department stores as well as traditional department stores, and the department store operations of such national chains as Sears Roebuck and Montgomery Ward.

The number of department stores reporting sales of the specified types of men's tailored/casual wear and the sales of this merchandise in 1982 are shown in the table below.

Men's Tailored/Casual Wear Sales in Department Stores, 1982

		Men's Tailored/Casual Wear Sales		
	No. of Stores Reporting Sales		% of Total Store Sales	
		Thous. $	Stores Handling Line	All Dept. Stores
Reported total	--	$3,599,284	4.8%	3.6%
Men's				
Overcoats/topcoats*	6,446	773,908	1.0	0.8
Suits & formal wear	3,816	541,974	1.0	0.5
Sportcoats & blazers	4,606	531,700	0.8	0.5
Dress & casual slacks, jeans, walking shorts	8,419	1,751,702	2.0	1.8

* Includes raincoats and outer jackets.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3.

While department stores still control the majority of upper priced men's tailored wear, most larger department stores have abandoned the lower priced category to the mass merchandisers and specialty stores. This trend is also evident in the special sizes categories where department stores are leaving the trade to other outlets types.

In recent seasons, many department stores have attempted to reassert themselves in better tailored clothing lines, but remain cautious. Many stores are now zeroing in on a limited number of brands and designer labels, and are themselves developing private label programs to fill in their basic needs. Many are also waiting to see which manufacturers and which importers are overstocked in order to provide themselves with off-price merchandise close to the selling season.

RETAIL SALES BY STORE TYPE

Specialty Stores

The 1982 census of retail trade collected the following information on sales of men's tailored and related apparel in men's wear stores and in family clothing stores. There was a notable drop in the contribution to men's wear stores' total sales made by men's suits and formal wear in 1982 compared with findings in the 1977 census--19.3% vs. 33.5%. The sales share reported for overcoats, topcoats and raincoats rose from 3.0% in 1977 to 7.5% in 1982; sales of sportcoats and blazers rose from 4.9% of total men's wear store sales in 1977 to 10.5%; dress and casual slacks, jeans and walk shorts, from 14.8% to 18.3%.

The combined total of the reported men's categories listed above represented 56.2% of men's specialty store sales in 1977, 55.6% in 1982. In family clothing stores, the comparable figures were 17.2% (1977) and 18.3% (1982).

Men's Tailored/Casual Wear Sales in Specialty Stores, 1982
(Covers stores with payroll only)

		Men's Tailored/Casual Wear Sales		
			% of Total Store Sales	
	No. of Stores Reporting Sales	Thous. $	Stores Handling Line	All Specialty Stores
MEN'S WEAR STORES				
Reported total	--	$4,295,166	34.3%	55.6%
Men's				
Overcoats, topcoats, raincoats*	13,124	579,066	9.4	7.5
Suits & formal wear	11,638	1,489,066	26.0	19.3
Sportcoats & blazers	12,164	809,768	13.7	10.5
Dress & casual slacks, jeans, walking shorts	15,038	1,417,266	20.6	18.3
FAMILY CLOTHING STORES				
Reported total	--	$2,448,483	25.2%	18.3
Men's				
Overcoats, topcoats, raincoats*	10,500	397,329	4.3	3.0
Suits & formal wear	6,596	311,368	5.0	2.3
Sportcoats & blazers	8,073	235,859	3.2	1.8
Dress & casual slacks, jeans, walking shorts	14,809	1,503,927	12.7	11.2

* Also includes outer jackets for men.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3.

RETAIL SALES BY STORE TYPE

Department Store Operating Results

The National Retail Merchants Association reports that in 1983, sales of all men's apparel was up 10% in department stores while men's clothing registered an increase of 9.6% during the same period. Sales of suits and formal wear were reported to have increased 2.7% in department stores in 1983 while overcoats, topcoats, rain, storm & dual-purpose coats as a group marked an increase of 9.4%.

Men's Departmental Merchandising & Operating Results in Department Stores with Total Annual Sales Over $1 Million, 1983
Typical (median) Results

	Adult Male Apparel	Men's Clothing	Overcoats, Topcoats, Rain, Storm, & Dual-purpose Coats	Suits & Formal Wear
Net sales, % change from last year	+ 10.0%	+ 9.6%	+ 9.4%	+ 2.7%
Sales, % of merchandise division	100.0	38.4	5.4	5.5
Sales, % of total store sales	12.7	5.1	0.7	0.7
$ sales per square foot of selling space	$182.8	$163.0	$181.9	$140.1
Cumulative markon, %	50.9	50.5	51.0	50.2
Gross margin, % of sales including cash discounts	43.1	38.5	42.8	28.8
Markdowns, retail, % of sales	15.5	20.4	19.3	30.9
Returns, % of sales	8.3	10.0	13.6	10.6
Number of stock turns	2.9	2.6	3.3	2.7
Salespeople's salaries, % of sales	6.7	7.2	5.7	7.5
Sales promotions, % of sales	3.0	3.3	3.9	3.6

na not available.

Source: National Retail Merchants Association, "Merchandising & Operating Results", 1984 Edition.

According to Retail Merchandising Service Automation of Riverside, California, retail sales on men's suits in specialty stores increased 3.2% in the first quarter of 1985 after recording a 0.3% increase for the full year of 1984. Dress slacks, which declined 1.5% in terms of specialty stores sales in 1984, continue their decline in 1985, falling 2.4% in the first quarter. Tailored outerwear according to RMSA reversed a climb of 1.1% in 1984. It then registered a decline of 1.1% in the first three months of 1985.

RMSA bases its estimates of men's specialty store sales on a nationwide survey of about 1,800 specialty stores which carry men's apparel.

RETAIL SALES BY STORE TYPE

Seasonal Patterns

Average Purchase Rate Per 1,000 Households, 1984
(In units)

	Sportcoats/Suits	Coats/Raincoats
Monthly average	38.4	59.8
January	42.0	61.9
February	43.7	43.9
March	41.3	55.0
April	30.7	37.9
May	34.7	27.1
June	39.7	28.1
July	23.7	19.4
August	28.8	29.8
September	31.9	52.4
October	32.1	73.9
November	42.7	112.7
December	70.1	176.0

Source: Newspaper Advertising Bureau based on
MRCA Information Services, 1984.

RETAIL ADVERTISING

Reports on newspaper advertising linage for 1984 show that the heaviest months for advertising of men's suits are March, followed by September and April. Retail advertising for slacks, in 1984 was heaviest in June and August, while for sportcoats, the heaviest months were December, October, and November.

Percent of Year's Total Newspaper Advertising Linage on Men's Clothing
By Months, 1984

	Slacks	Sportcoats	Suits
Total	100.0%	100.0%	100.0%
January	3.6	5.0	4.4
February	6.2	7.0	6.8
March	8.2	7.5	12.0
April	8.1	6.3	11.3
May	6.8	5.6	9.5
June	12.2	7.6	7.3
July	7.5	4.4	5.0
August	11.9	6.2	5.9
September	8.1	10.6	11.7
October	7.9	13.3	10.2
November	9.1	12.5	9.4
December	10.4	14.0	6.5

Source: Advertising Checking Bureau,
Newspaper Advertising Bureau, Inc.

CONSUMER PRICE INDEX

While the consumer price index for men's wear rose 1.9% in 1984, the CPI for suits, sportcoats and jackets rose only 1.7% that of coats and jackets actually declined 0.2%. This compares favorable with the 4.3% rise which was registered overall during the year.

Between August 1984 and August 1985, however, the producer rice index for men's coats and jackets rose 2.5% while that of suits, sportcoats and jackets was off 5.2%. Overall the consumer price level as measured by the CPI rose 3.0% during this period.

Consumer Price Indexes for Selected Men's Apparel Items
(12/77 = 100, unless otherwise noted)

	August Average			Annual Averages		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
All items*	319.6	310.3	+ 3.0%	311.1	298.4	+ 4.3%
Apparel less footwear*	187.0	200.8	- 6.9	183.2	180.8	+ 1.3
Men's wear	125.2	122.1	+ 2.5	121.1	118.9	+ 1.9
Suits, sportcoats & jackets	108.1	114.0	- 5.2	112.8	110.9	+ 1.7
Coats & jackets	103.5	102.4	+ 1.1	101.2	101.4	- 0.2

* 1967 = 100.

Source: U.S. Bureau of Labor Statistics.

CONSUMER BUYING HABITS

The following information on purchases of men's tailored clothing and rainwear for the year 1984 comes from the Newspaper Advertising Bureau and is based on data from MRCA Information Services, of Stamford Connecticut. The data is based on findings from an ongoing panel of consumers who track the purchases of 11,500 nationally representative families.

Price Line

Percent of Men's Tailored Clothing Purchased by Price Line, 1984

	Overcoats & Topcoats	Raincoats & All Weather Coats	Suits	Sportcoats & Blazers
Under $25	9.7%	31.4%	1.4%	6.7%
$25.00 - $49.99	20.1	16.1	6.6	25.3
$50.00 - $99.99	34.9	40.6	37.0	51.2
$100.00 - $149.99	17.0	6.3	24.8	11.4
$150.00 - $199.99	10.2	3.7	18.7	3.4
$200.00 & over	8.1	2.0	11.6	1.9
Total purchases	100.0	100.0	100.0	100.0

(continued)

ONSUMER BUYING HABITS

Price Line (continued)

Percent of Men's Slacks Purchased By Price Line, 1984

	Slacks
Under $10.00	11.3%
$10.00 - $19.99	51.6
$20.00 - $29.99	28.1
$30.00 - $39.99	5.8
$40.00 - $49.99	1.7
$50.00 & over	1.5
Total purchases	100.0%

Source: MRCA Information Services, 1984,
derived from the 1986 Newspaper Advertising
Planbook.

By Store Type

The following data on purchases of men's slacks by type of outlet is from TRAC, a division of NFO Research. The data is based on a nationally representative panel of 30,000 households which are surveyed every two months as to their household purchases.

Men's Slacks Purchases By Store Type

	1984		1983	
	Sept./Oct.	Mar./Apr.	Sept./Oct.	Mar./Apr.
Department stores	30.4%	30.2%	27.7%	26.4%
Mass merchandisers (Sears, Penney, Ward)	25.8	23.3	25.7	25.1
Specialty Stores	16.1	17.2	19.1	17.2
Discounters/off-price outlets	17.3	19.6	17.8	17.7
All other outlets	10.4	9.7	9.6	13.1

Source: TRAC Division,
NFO Research, Inc.,
Toledo, Ohio.

FAIRCHILD FACT FILES CURRENTLY AVAILABLE

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now--1985 Edition will be available in February, 1986)

DEPARTMENT STORE SALES: (Including selected major apparel specialty store sales) Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1984 Edition available now--1985 Edition will be available in January, 1986)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. (1984 Edition available now--1985 Edition will be available in August, 1985).

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRICAL HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (Includes a new consumer buying intention survey) (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and physical fitness.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons are made with findings in the last previous census, covering operations in 1977. (December)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (August)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change.

For orders and further information, please write to:

FAIRCHILD FACT FILES
Fairchild Books
7 East 12th Street
New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.81-U

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

Department Store Sales

Including Selected Major Apparel Specialty Stores

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director

Kenneth Greenman, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

TABLE OF CONTENTS

Page

INTRODUCTION 1

SUMMARY OF AVAILABLE SALES FIGURES
DEPARTMENT STORES & LEADING APPAREL
SPECIALTY STORES, 1984 (BY REGION) 2

DEPARTMENT STORE VOLUME LEADERS
STORES WITH TOTAL SALES OF $100 MILLION OR MORE 28
STORES WITH SALES OF $50 MILLION TO $99 MILLION 33

SALES FIGURES FOR MAJOR NATIONAL/REGIONAL CHAINS 34

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED
BY CONGLOMERATE CORPORATIONS 39

SCHEDULE OF ADDITIONAL FACT FILES 45

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding or because sales for each store included in the totals were not available.

E.B. Gold, Manager
Fairchild Book Division

Copyright © 1985 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-559-3

Printed in the United States of America

INTRODUCTION

This report summarizes information on the number of stores operated and sales of traditional department stores, as well as larger apparel specialty stores. They are listed by region, state and city in the U.S. Sales figures are for the year of 1984 or its closest fiscal period. They are based on published figures or the best available trade sources, including the Fairchild trade newspapers, Dun & Bradstreet, the National Retail Merchants Association and other trade information.

A separate listing is included of department stores having a volume of $50 million or more (at the buying headquarter level) for which data is available. An additional list is included of the major national/regional chains selling apparel and general merchandise, and also a list of the traditional department stores and apparel stores operated by conglomerate corporations.

The Standard Industrial Classification (SIC) Manual defines department stores as establishments normally employing 25 people or more, having combined sales of apparel and soft goods amounting to 20 percent or more of the total sales, and selling each of the following lines of merchandise:

1. Furniture, home furnishings, appliances, radios and TV sets
2. A general line of apparel for the famiy
3. Household linens and dry goods

To qualify as a department store, sales of each of the above listed lines must be less than 80 percent of the total sales. An establishment with total sales of $10 million or more is classified as a department store even if sales of one of the merchandise lines listed above exceeds the maximum percent of total sales, provided that the combined sales of the other two groups are $1 million or more. Relatively few stores are included in this classification as a result of this special rule and most of those which are would otherwise have been classified in the apparel group.

To an increasing extent, however, department stores are diversifying their activities, opening specialty store units, off-price outlets, etc., or becoming part of conglomerate operations active in a number of different types of businesses. This has, of course, added to the difficulty of isolating department store volume from consolidated sales data.

Stores are also expanding their operations beyond the trading area of the headquarter store, and to a growing degree, are even opening stores in geographical regions different from the headquarters' location. The sales attributed to headquarter locations may, therefore, cover activities removed from the specific city or trading area in which they are listed in the Fact File. Data on branch store operations is included where available.

NOTE: This report includes only those stores for which sales data, believed to be reasonably accurate, can be reported. The current sales estimates may differ markedly from estimates reported for previous years. This may be due, however, not to an actual gain or loss in volume of the magnitude indicated but to differences in the compilation of estimates. Since revisions in earlier estimates may be in order, year-to-year comparisons in sales figures are not recommended.

Audrey S. Balchen, Director
Fairchild Market Research Division

SUMMARY OF AVAILABLE SALES FIGURES
DEPARTMENT STORES & LEADING APPAREL SPECIALTY STORES, 1984
BY REGION

NORTHEAST	APPROX. SALES (Millions of $)
CONNECTICUT	
Bridgeport	
Read's Department Stores (Allied Stores, New York, N.Y.) (6 stores: Conn. 5, N.Y. 1)	$ 100.0
Skydel's, Inc. (1 spec. store)	3.0
Greenwich	
D.W. Rogers, Inc. (1 spec. store)	3.5
Hartford	
G. Fox & Co. (May Dept. Stores, St. Louis, Mo.) (8 stores: Conn. 6, Mass. 1, R.I. 1)	193.0
Sage-Allen & Co. (12 jr. dept. stores in Conn.) (Hartford store was renovated in 1984)	66.0
Middletown	
Shapiro's (1 spec. store)	6.0
MAINE	
Brunswick	
W.F. Senter Co. (1 jr. dept. store)	3.5
Damariscotta	
R.H. Reny, Inc. (13 jr. dept. stores in Maine)	10.0
Freeport	
L.L. Bean (Primarily a mail order business; one store with sales estimated at over $30 million)	250.0
Portland	
Porteous Mitchell & Braun Co. (7 dept. stores: Me. 6, N.H. 1, plus 2 Downeast shops)	40.0
MASSACHUSETTS	
Attleboro	
London's, Inc. (5 spec. outlets)	6.0+
Boston Area	
Filene's (Federated Department Stores, Cincinnati, Oh.) (15 department stores: Mass. 10, N.H. 2, Me. 1, R.I. 1, Conn. 1) (Filene's opened a store in Albany, N.Y. in 1985)	328.4
Filene's Basement, Wellesley (Federated) (14 stores: Conn. 1, Ma. 10, N.Y. 3) (Stores in Paramus, N.J., Warwick, R.I., and Scarsdale, N.Y. were opened in 1985.)	188.8
Jordan Marsh (Allied Stores, New York, N.Y.) (17 dept. stores: Ct. 1, Ma. 12, Me. 1, N.H. 2, R.I. 1) (A store in Albany, N.Y. was opened in 1985; a Nashua, N.H. store will be opened in the Summer of 1986).	520.0
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.) Copley Place	20.0
Sara Frederick's (10 specialty stores; acquired by Hutzler Bros. Co., Baltimore, Md., in October 1984).	15.0

DEPARTMENT/SPECIALTY STORES

NORTHEAST	APPROX. SALES (Millions of $)
MASSACHUSETTS	
Pittsfield	
England Brothers, Inc. (3 Mass. jr. dept. stores)	$ 11.0
Salem	
Jerry's Dept. Stores, Inc. (Operated Jerry's Dept. Stores and Rich's Dept. Stores (16) in Me., Ma., N.H.)	60.0
Springfield	
Albert Steiger, Inc. (9 dept. stores: Mass. 8, Conn. 1)	55.0
Topsfield	
Empire Clothing Co. (19 spec. stores in Ma. & Me.)	17.0
Waltham	
Grover Cronin, Inc. (1 jr. dept. store)	13.0
NEW HAMPSHIRE	
Laconia	
O'Shea's Dept. Store (1 jr. dept. store)	5.0
NEW JERSEY	
Lakewood	
Reynolds Bros., Inc. (5 spec. stores in N.J.)	8.0
Newark	
Bamberger's (R.H. Macy & Co., New York, N.Y.) (23 dept. stores: N.J. 14, Pa. 5, N.Y. 1, Del. 1, Md. 2. Also Furniture Clearance Centers) (Bamberger's will open 2 more stores in the Baltimore, Md. area in 1986; in 1987, they will open stores in Hamilton Township, N.Y. and in Tyson's Corner, Va.)	1,128.0
Hahne & Co. (Associated Dry Goods, New York, N.Y.) (8 dept. stores in N.J.)	120.0
Ocean City	
Stainton's Department Store (1 dept. store)	6.5
Paramus	
Stern's (Allied Stores, New York, N.Y.) (17 dept. stores: N.Y. 10, N.J. 7)	390.0
Paterson	
Jacobs Department Store (1 dept. store)	10.0
Meyer Brothers (2 N.J. dept. stores)	4.5
Ridgewood	
Sealfons (Brooks Sealfons, Inc., Summit, N.J.) (1 spec. store)	7.0
Trenton	
S.P. Dunham & Co. (United Dept. Stores, Newark, N.J.) (4 spec. stores in N.J. and Pa.)	23.0

DEPARTMENT/SPECIALTY STORES

NORTHEAST

NEW YORK

	APPROX. SALES (Millions of $)
Amherst	
Jenss Dept. Stores (4 N.Y. dept. stores)	$ 15.0
Binghamton	
Boscov's (Boscov's, Reading, Pa.)(1 dept. store opened in 1984)	29.0
Buffalo	
Adam, Meldrum & Anderson (10 dept. stores in N.Y.)	110.0
L.L. Berger, Inc. (7 spec. stores in N.Y.)	17.0
The Sample, Inc. (10 spec. stores in N.Y.)	22.0
Cohoes	
Cohoes Spec. Stores (4 N.Y. spec. stores)	35.0
Elmira	
S.F. Iszard Co., Inc. (12 jr. dept. stores in N.Y.)	12.0
Rosenbaum's of Elmira, Inc. (3 spec. stores in N.Y.)	4.0
Gloversville	
Argensinger's Dept. Store, Inc. (2 gen. mdse. stores, 10 spec. stores in N.Y.)	8.0
Jamestown	
Jamestown-Bigelow Co. (1 dept. store. Also operates 2 spec. stores)	4.0
Kingston	
Britts Dept. Store Corp. (Harjack-Kingston Inc.) (1 dept. store)	6.5
Latham	
Interstate Department Stores Inc. (Toys "R" Us, Rochelle Park, N.J.) (Central buying for 2 Boston stores in Latham & Schenectady, N.Y.; 2 The Fair Stores, Flint & Burton, Mich.)	40.0
Liberty	
Sullivan Dept. Stores (2 N.Y. jr. dept. stores)	15.0
New York City Area	
Abraham & Straus, Brooklyn (Federated Dept. Stores, Cincinnati, Oh.) (15 dept. stores: N.Y. 9, N.J. 4, Pa. 2)	781.0
Alexander's Dept. Stores, Inc. (15 discount spec. stores: Conn. 1, N.J. 2, N.Y. 12)	520.0
(Announced plans in Dec. 1985 to close its flagship store in New York City as part of a redevelopment of the site; the earliest the store will be closed would be Christmas 1986).	
B. Altman & Co. (The Altman Foundation has an agreement in principle with developers/real estate investors plus Hutzlers, Baltimore, Md., who would acquire Altman's)	240.0
Flagship store, Fifth Avenue	110.0
Barney's (1 N.Y. spec. store)	65.0
(Will open a separate women's store in June 1986 which is expected to reach a volume of $20 million in its first year).	
Henri Bendel (1 spec. store) (Sales include $8.0 million in mail orders)	26.0
(Acquired by The Limited, Inc. in Oct. 1985)	
Bergdorf Goodman (Carter Hawley Hale, Los Angeles, Ca.) (1 New York City spec. store)	60.0

(New York City Area continued)

DEPARTMENT/SPECIALTY STORES

NORTHEAST

NEW YORK

New York City Area

	APPROX. SALES (Millions of $)
Bloomingdale's (Federated Dept. Stores, Cincinnati, Oh.) (14 dept. stores plus the home store Chestnut Hill, Mass.; Conn. 1, Fla. 1, Md. 1, Mass. 1, N.J. 2, N.Y. 4, Pa. 2, Tx. 1, Va. 1)	$ 903.0
Paramus (largest branch store)	60.0
Valley View Center, Dallas	50.0
(A store in The Falls, Fla. was opened in August 1985. The N.Y. flagship store is undergoing a 3-year renovation program and the White Flint, Kensington, Md. store is to be remodeled.)	
Bonwit Teller (Allied Stores, New York, N.Y.) (15 spec. stores: Mass. 1, N.Y. 3, N.J. 1, Pa. 2, Ill. 2, Mich. 1, Mo. 1, Fla. 2, Ca. 2)	140.0
(The Country Club Plaza, Kansas City, Mo. store was opened in November 1984 and was expected to reach a volume of $12 million in its first full year)	
Gimbels-East (Batus Inc., New York, N.Y.) (20 stores: N.Y. 8, Conn. 1, N.J. 3, Pa. 8)	475.0
New York Area	300.0
Philadelphia & Southern N.J. (9 stores)	175.0
Lord & Taylor (Associated Dry Goods Corp., New York, N.Y.) (41 stores: Conn. 2, D.C. 1, Fla. 5, Ga. 1, Ill. 7, Md. 1, Mass. 3, Mich. 4, N.J. 2, N.Y. 5, Pa. 2, Tex. 6, Va. 2)	695.0
(In October 1985, L&T opened a store in the Miami International Mall and in Boynton Beach, Fla. Each of these is expected to reach a volume of $20 million in 5 years. In 1986, stores will be opened in Boca Raton and in Dadeland, Fla.)	
Macy's New York (R.H. Macy, New York, N.Y.)(21 dept. stores: N.Y. 14, Conn. 2, Fla. 1, Tex. 4, plus furniture clearance centers	1,290.0
Herald Square flagship	380.0
Adventura Mall, North Miami, Fla.	60.0
(Macy's opened its 3rd Houston store (Baybrook Mall) in July 1985; a 4th, in the Houston Galleria, will be opened in the Fall, 1986. Macy's 1st Dallas store (Galleria) was opened in October 1985)	
Mays (J.W. Mays Inc., Brooklyn, N.Y.) (4 dept. stores in N.Y.)	84.7
Ohrbach's (AMCENA Corp., New York, N.Y.) (12 spec. stores: Ca. 6, N.J. 3, N.Y. 3)	200.0
Saks Fifth Avenue (Batus Inc., New York, N.Y.) (43 spec. stores: Ar. 1, Ca. 9, Conn. 1, Fla. 5, Ga. 1, Ill. 3, La. 1, Md. 1, Mass. 1, Mich. 3, Mo. 2, Nev. 1, N.J. 2, N.Y. 4, Oh. 3, Pa. 2, Tex. 3)	875.0
Flagship store, New York	183.0
Chicago	31.0
San Francisco	35.0
Southern California (6 stores)	95.0
Beverly Hills	32.0
(Saks Fifth Avenue opened stores in Owings Mills, Md., Boca Raton, Fla. and North Star Mall, San Antonio, Tex., in 1985. A Palm Springs, Ca. replacement store was opened in November 1985. A Denver, Co. store opening is planned.)	

(The Limited opened its first N.Y.C. store, on Madison Avenue, November 1985. This location encompasses 3 separate divisions: The Limited Stores, Limited Express and Victoria's Secret, each merchandised independently. The composite volume is expected to reach $10 million in the first year of operation.)

DEPARTMENT/SPECIALTY STORES

NORTHEAST

	APPROX. SALES (Millions of $)
NEW YORK	
Niagara Falls	
Beir Bros. Inc., Rainbow Center (1 spec. store)	$ 8.0
Olean	
Bradner's, Inc. (1 gen. mdse. store)	3.5
Oneonta	
Bresee's Oneonta Dept. Store (1 dept. store)	6.0
Patchogue	
Swezey & Newings, Inc. (3 N.Y. dept. stores)	21.0
Rochester	
B. Forman & Co. (McCurdy & Co., Rochester) (8 N.Y. spec. stores)	20.0
McCurdy & Co. (7 N.Y. dept. stores)	58.0
Sibley, Lindsay & Curr (Associated Dry Goods, New York, N.Y.) (14 N.Y. dept. stores)	180.0
Schenectady	
The Carl Co. (7 N.Y. dept. stores)	30.0
Seaford	
Mid-Island Department Stores (7 L.I. spec. stores)	30.0
Syracuse	
The Addis Co. (4 N.Y. spec. stores)	11.0
Chappell's Dept. Store (7 N.Y. spec. stores)	30.0
Dey's (Allied Stores Corp., New York, N.Y.) (4 N.Y. spec. stores)	48.0
Hess's, Allentown, Pa., opened 2 stores--in Camillus Plaza Mall and Fayetteville Mall in August 1984. A combined volume of $20 million was expected in the first year of operation.	
White Plains	
Howland-Steinbach (Supermarkets General, Woodbridge, N.J.) (19 Howland's stores: Conn. 6, Mass. 1, N.H. 1, N.Y. 11; 10 Steinbach's in N.J.)	182.5
(The Hochschild part of this operation was discontinued in 1984--1 store, Reistertown Plaza, Baltimore, was closed, and the other 3 Baltimore stores were sold to Hutzler's)	
PENNSYLVANIA	
Allentown	
Hess's Department Stores, Inc. (Crown American Corp., Johnstown, Pa.) (32 dept. stores plus 3 franchise operations: Md. 1, N.Y. 5, Pa. 26)	273.6
(Hess's acquired 8 Rices Nachmans units from Phillips-Van Heusen in 1985--5 of which were reopened immediately and expected to reach a total volume of $22 million in the first year. A Pembroke Mall, Virginia Beach store will be opened in the Spring of 1986. Plans were also reported for Hess's to acquire Maloney Enterprises, a privately-held discount dept. store chain with a volume of $80 million in 1985)	

DEPARTMENT/SPECIALTY STORES

NORTHEAST

PENNSYLVANIA

	APPROX. SALES (Millions of $)
Aston	
The Dry Goods (SCOA Industries, Columbus, Ohio) (7 gen. mdse. stores: Del. 3, N.J. 2, Pa. 2)	$ 100.0
Easton	
Horn's Fashion Inc. (4 Pa. specialty stores)	3.0
Orr's Dept. Store (5 gen. mdse. stores: N.J. 3, Pa. 2)	15.0
Harrisburg	
Pomeroy's, Inc. (Allied Stores, New York, N.Y.) (5 Pa. dept. stores, not including 8 stores operated out of Levittown, Pa.) Pomeroy's also operates 2 former Troutman stores acquired in 1985--in Greensburg, Pa., and in Coventry Mall near Pottstown.	50.0
Havertown	
Weinberg's, Inc. (2 spec. stores)	4.0
Hazelton	
P. Deisroth's Sons (2 Pa. dept. stores)	6.0
Indiana	
Brody Bros. Inc. (3 Pa. spec. stores)	5.0
Johnstown	
Glosser Bros. (1 dept. store)	11.0
Lancaster	
Watt & Shand (2 Pa. dept. stores)	28.0
Levittown	
Pomeroy's, Inc. (Allied Stores, New York, N.Y.) (8 dept. stores: Del. 1, N.J. 1, Pa. 6)	80.0
Lewistown	
Dank's & Co. (4 gen. mdse. stores in Pa.)	7.0
Philadelphia	
Gimbels (Gimbels-East, New York, N.Y.) (9 dept. stores serving Philadelphia and southern N.J.)	175.0
Nan Duskin Specialty Stores (Philadelphia and Pittsburgh)	12.0
Strawbridge & Clothier (Operates department stores and Clover Stores--20 discount variety stores with a volume of $250 million)	630.5
Department stores (12 stores: Del. 2, N.J. 3, Pa. 7)	380.5
John Wanamaker (Carter Hawley Hale, Los Angeles, Ca.) (16 stores incl. The Globe (Cleland-Simpson), Scranton; other stores: Del. 1, N.J. 2, N.Y. 1, Pa. 11)	430.0

DEPARTMENT/SPECIALTY STORES

NORTHEAST	APPROX. SALES (Millions of $)
PENNSYLVANIA	
Pittsburgh	
Gimbels-Pittsburgh (Batus Inc., New York, N.Y.) (7 Pa. dept. stores)	$ 165.0
Joseph Horne Co. (Associated Dry Goods, New York, N.Y.) (13 dept. stores: Oh. 3, Pa. 10)	185.0
Kaufmann's Department Stores (May Department Store Co., St. Louis, Mo.) (11 dept. stores: Oh. 2, Pa. 8, W.Va. 1)	327.4
Reading	
Boscov's Dept. Stores, Inc. (10 dept. stores: Del. 1, N.Y. 1, Pa. 8)	221.0
Boscov's East, Reading (Enlarged in 1985 and expected to reach a volume of $25 million in 1985)	21.0
Wilkes Barre store	32.0
(Boscov's opened a store in Camp Hill Shopping Mall, Harrisburg, Pa., in September 1985)	
Scranton	
The Globe (Cleland-Simpson Co.) (Owned by John Wanamaker, Philadelphia, Pa.) (1 dept. store)	20.0
State College	
O.W. Houts & Son, Inc. (1 gen. mdse. store)	6.5
Uniontown	
Metzler's Dept. Store (2 gen. mdse. stores in Pa.)	5.0
Warren	
Levinson Bros. (2 gen. mdse. stores in Pa.)	5.0
York	
S. Grumbacher & Sons, Inc. (18 jr. dept. stores in Ind., Md. Oh., Pa., W.Va., operated under various names)	50.0
VERMONT	
St. Johnsbury	
Hovey's Shop, Inc. (2 gen. mdse. stores: N.H. 1, Vt. 1; also a spec. apparel store and a shoe store)	5.0
NORTH CENTRAL	
ILLINOIS	
Bloomington	
Rolands of Bloomington, Inc. (2 spec. stores in Ill.)	5.0
Champaign	
Robeson's, Inc. (1 jr. dept. store)	8.0

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL	APPROX. SALES (Millions of $)
ILLINOIS	
Chicago Area	
Carson Pirie Scott & Co. (dept. & spec. stores)	
Retail group total	$ 593.8
Dept. stores (21 stores: Ill. 18, Ind. 3	369.0
(County Seat spec. chain acquired from SuperValu, Hopkins, Mn. in May 1984, and CPS Direct Marketing acquired from MacDonald's in 1984. The former was reported to have an annual rate of sales amounting to $200 million in 1984, the latter, $100 million)	
(Carson Pirie Scott closed 3 stores in Jan. 1985: Peoria, Kewanee and Ottawa, Ill. Randhurst and Yorktown stores were renovated in 1984, Evergreen in 1985)	
(Carson Pirie Scott completed the sale and leaseback of 6 of its suburban Chicago stores in Nov. 1985 with Six Anchors Ltd. Partnerships, a Towson, Md. real estate concern; the stores will continue to operate as in the past.)	
Crawford Dept. Stores (3 gen. mdse. stores in Ill.)	14.0
Goldblatt Bros., Inc. (7 dept. stores in Chicago area)	35.0
Lytton's (Spec. stores: 9 of 12 stores have been closed, but the decision to close the State St. flagship stores, which had a 1983 volume of $10.8 million, has been changed)	25.0
Main Street (Federated Department Stores Inc., Cincinnati, Oh.) 3 Chicago stores opened in Fall 1984.	9.8
(7 additional stores are to be opened in the Chicago area)	
Marshall Field (Batus Inc., New York, N.Y.) (21 dept. stores: Ill. 17, Tex. 3, Wis. 1)	750.0
Meyer Bros. Dept. Store (1 dept. store)	5.0
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.)	31.0
Charles A. Stevens (26 spec. stores)	70.0
Wieboldt Stores, Inc. (13 Chicago area dept. stores) (Attempted acquisition by WSI Acquisition Corp., in October 1985)	191.2
Columbia	
Brittany, Ltd. (4 spec. stores)	8.0
Weilbacher's, Inc. (1 gen. mdse. store)	4.0
Elgin	
Ackemann Bros., Inc. (3 gen. mdse. stores)	5.0
Joseph C. Spiess Co. (4 dept. stores)	15.0
Granite City	
The Glik Co., Inc. (9 family clothing stores)	10.0
(Also operates 4 women's spec. stores and 2 men's spec. stores)	
Peoria	
P.A. Bergner & Co. (25 dept. stores: Ill. 22, Wis. 3)	220.0
(Bergner's headquarters were shifted to Milwaukee, Wis. in March 1985. The Peoria store was closed in January 1985. Bergner bought the Boston Store Div.--8 stores--from Federated in January 1985. See Milwaukee)	
(May Department Stores Co., St. Louis, Mo., opened a Peoria store in 1985)	

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL	APPROX. SALES (Millions of $)
ILLINOIS	
River Forest	
Madigan's (5 spec. stores)	$ 27.0
Rock Island	
McCabe's (1 gen. mdse. store)	4.0
St. Charles	
Colson's (2 spec. stores)	4.0
Tinley Park	
Gately's People's Store (1 jr. dept. store)	12.0
Waukegan	
Globe Dept. Stores (5 gen. mdse. stores)	7.0
INDIANA	
Elkhart	
Ziesel Dept. Stores (2 gen. mdse. stores)	5.0
Indianapolis	
L.S. Ayres & Co. (Associated Dry Goods Corp., New York, N.Y.) (18 dept. stores: Ind. 13, Ky. 1, Oh. 4) (Merged with H. & S. Pogue, Cincinnati, Oh.--5 stores--in November 1984. ADG has announced plans to merge its 7-store Stewart Dry Goods Div., Louisville, Ky., into Ayres effective January 1986)	329.0
William H. Block & Co. (Allied Stores Corp., New York, N.Y.) (11 Ind. dept. stores) (The Edw. Wren stores (2) were merged into Block's in 1984)	90.0
(Giddings Jenny, Cincinnati, Ohio spec. store operation opened its first branch store in Indianapolis in 1984. It is expected to reach an annual volume of $5.5 million in its 1st full year.)	
Lafayette	
Loeb's Inc. (4 gen. mdse. stores: Ind. 3, Ill. 1)	7.0
Muncie	
Ball Stores, Inc. (2 gen. mdse. stores, 1 spec. store in Ind.)	8.0
South Bend	
Deitch-Corson (3 gen. mdse. stores in Ind.)	15.0
Terre Haute	
Root Dry Goods (Mercantile Stores, New York, N.Y.) (1 dept. store)	10.0
Schultz & Co. (1 gen. mdse. store)	5.0
Valparaiso	
J. Lowenstine & Sons, Inc. (1 jr. dept. store)	5.0

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL

	APPROX. SALES (Millions of $)
IOWA	
Cedar Rapids	
Armstrong's (2 Ia. dept. stores)	$ 22.0
Davenport	
Peterson-Harned-Von Maur, Inc. (9 dept. stores: Ill. 1, Ia. 8)	55.0
Des Moines	
Younkers, Inc. (Equitable of Iowa Companies, Des Moines, Ia.) (29 dept. stores: Ill. 1, Ia. 24, Mn. 1, Neb. 2, S.D. 1) (Ottumwa, Ia. store was closed in January 1985.	188.6
KANSAS	
Coffeyville	
Read's, Inc. (3 spec. stores: Kans. 1, Okla. 2)	4.0
Fort Scott	
Litwin's Inc. (20 spec. stores in Kans. & Okla.)	15.0
Hutchinson	
D.G. Calhoun, Inc. (Kruger's Co.) (13 spec. stores)	10.0
Kansas City (See MISSOURI)	
Wichita	
Henry's (4 Kans. spec. stores)	14.0
MICHIGAN	
Detroit	
Crowley Milner (9 Mich. dept. stores) (Acquired by Oakland Holding Co. in 1985) (Will open a replacement downtown store in New Center, Detroit in May 1986. A store in Southfield, Mich. was opened in October 1985; a Burton Mich. store will be opened in March 1986)	92.9
Hudson's--see Dayton Hudson, Minneapolis, Minn.	
Grand Rapids	
Herp's (7 Mich dept. stores) (Allied Stores Corp., New York)	16.0
Paul Steketee & Sons (6 Mich. gen. mdse. stores)	30.0
Jackson	
Jacobson Stores Inc. (20 dept. stores: Fla. 9, Mich. 10, Ohio 1) (Opened a store in Tampa, Fla. in March 1985)	240.7
Kalamazoo	
Gilmore Brothers, Inc. (4 gen. mdse. stores in Mich.)	12.0
Saginaw	
W.C. Wiechmann Co. (3 Mich. gen. mdse. stores)	10.0

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL	APPROX. SALES (Millions of $)
MINNESOTA	
Duluth	
Duluth Glass Block Stores Co. (Mercantile Stores, New York, N.Y.) (1 dept. store)	$ 22.0
Mankato	
Bretts Dept. Stores (5 Minn. jr. dept. stores)	12.0
Minneapolis	
Dayton Hudson Dept. Store Co. (36 stores in Mich., Minn., N.D., S.D., Wis.)	1,396.3
Donaldson's (Allied Stores, New York, N.Y.) (9 stores: Ia. 2, Minn. 7)	120.0
City Center	23.0
Harold's (1 spec. store)	8.0
J.C. Penney (1 store)	10.0
Powers Dry Goods (Associated Dry Goods, New York, N.Y.) (7 Minn. dept. stores. Acquired by Allied Stores in June 1985. The branch stores are to be merged with Donaldson's the flagship store in Minneapolis is to be sold.)	50.0
Nicollet Mall store	8.0
Redwood Falls	
Ehler's Retail Services (16 Minn. spec. stores)	12.0
St. Cloud	
The Fandel Co. (1 jr. dept. store plus 3 Intrigue spec. stores in Minn.)	6.0
G.R. Herberger's Inc. (25 dept. stores: Minn. 9, Mont. 3, Neb. 3, N.D. 4, S.D. 2, Wis. 3, Wyo. 1)	75.0
MISSOURI	
Joplin	
Newman's (6 spec. stores: Kans. 2, Mo. 2, Okla. 2)	25.0
Kansas City	
Halls Merchandising, Inc. (Hallmark Cards, Inc., Kansas City) (3 K.C. dept. stores)	35.0
Jack Henry Clothing (5 Mo. spec. stores)	14.0
The Jones Store Co. (Mercantile Stores, New York, N.Y.) (7 Mo. dept. stores)	170.0
Macy's (17 stores: Kans. 6, Mo. 6, Oh. 5. Consolidated with Davison's, Atlanta in February 1985 to form Macy's Atlanta) (The Bowling Green, Ohio store was closed February 1985; 3 stores in Toledo, 1 in Findlay plus a Toledo warehouse store were sold in July 1985 to Elder Beerman Stores Corp.)	240.0
Perryville	
Rozier Mercantile Co., Inc. (4 spec. stores)	6.0
St. Joseph	
The Paris (15 spec. stores)	9.0

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL

	APPROX. SALES (Millions of $)
MISSOURI	
St. Louis	
Dillard Dept. Stores, St. Louis Div. (Stix was acquired by Dillard Dept. Stores, Little Rock, Ark. in January 1984 including 11 stores: Ill. 1, Ka. 1, Mo. 9. The downtown store was closed for remodeling, then reopened in August 1985. Sales for the first year in this store are planned at $20 million. Sales for Stix, Baer & Fuller prior to the sale were at an annual rate of about $150 million)	$ 150.0
Famous-Barr Co. (May Dept. Stores Co., St. Louis, Mo.) (16 dept. stores: Mo. 13, Ill. 3)	450.9
Downtown St. Louis store (remodeling completed in 1985) (St. Louis Centre and Peoria stores were opened in 1985)	54.0
Springfield	
Heer's Inc. (Allied Stores, New York, N.Y. (2 dept. stores)	15.0
NEBRASKA	
Freemont	
George Schweser's & Sons (14 Neb. gen. mdse. stores)	8.0
Lincoln	
Miller & Paine Inc. (3 Neb. dept. stores)	10.0
Omaha	
J.L. Brandeis & Sons (10 dept. stores: Ia. 2, Neb. 8)	95.0
Philips Stores, Inc. (6 gen. mdse. stores: Ia. 2, Neb. 4)	12.0
Richman-Gordman Stores, Inc. (12 gen. mdse. stores: Ia. 4, Kans. 2, Nev. 6)	150.0
NORTH DAKOTA	
Fargo	
deLendrecie's, West Acres Shopping Center (Mercantile Stores Co., New York, N.Y.) (1 gen. mdse. store)	16.0
Grand Forks	
Mandel's (6 N.D. spec. stores)	5.0
OHIO	
Akron	
The M. O'Neil Co. (May Department Stores, St. Louis, Mo.) (10 Ohio dept. stores)	165.8
Ashtabula	
Carlisle's (9 dept. stores: Oh. 5, Pa. 4)	50.0
Bowling Green	
Fred W. Uhlman & Co. (15 spec. stores: Ind. 1, Ohio 14)	20.0

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL

	APPROX. SALES (Millions of $)
OHIO	
Cincinnati	
Giddings Jenny (2 spec. stores: Ind. 1, Oh. 1)	$ 12.0
McAlpin Co. (Mercantile Stores, New York, N.Y. (7 stores: Oh. 6, Ky. 1)	280.0
Shillito Rikes (Federated Department Stores, Cincinnati, Oh.) (14 dept. stores: Oh. 10, Ky. 4)	381.1
(Saks Fifth Avenue, New York, opened a store in Cincinnati in March 1984 which was expected to reach an annual rate of $15 million in its first year)	
Cleveland	
The Higbee Co. (11 dept. stores in Ohio plus a budget store and a homefurnishings store)	263.9
The May Co.-Cleveland (May Department Stores, St. Louis, Mo.) (10 dept. stores in Oh.)	229.7
Columbus	
F. & R. Lazarus (Federated Deptartment Stores, Cincinnati, Oh.) (17 dept. stores: Ind. 5, Oh. 11, W. Va. 1)	453.4
Dayton	
The Elder Beerman Store Corp. (20 dept. stores in Oh. & Ind. plus 2 furniture stores and clearance centers)	238.0
(In July 1985, Elder-Beerman bought 4 Ohio department stores from Macy's Atlanta Div.--3 in Toledo, 1 in Findlay)	
East Liverpool	
The New Ogilvie's (D.M. Ogilvie & Co.) (1 dept. store)	4.0
North Canton	
J.A. Conley Co. (12 gen. mdse. stores)	10.0
Portsmouth	
Marting's (2 jr. dept. stores in Oh.)	8.5
Toledo	
The Lion Dry Goods Co. (Mercantile Stores Co., Inc., New York N.Y.) (2 dept. stores, 1 home store, 1 fashion store)	100.0
Youngstown	
Strouss (May Department Stores, St. Louis, Mo.) (9 dept. stores: Oh. 7, Pa. 2)	92.6

DEPARTMENT/SPECIALTY STORES

NORTH CENTRAL

WISCONSIN

	APPROX. SALES (Millions of $)
Brookfield	
T.A. Chapman Co. (7 gen. mdse. stores in Wis.)	12.0
Kohl's Department Stores (Batus Inc., New York, N.Y.) (33 dept. stores: Ill. 3, Ind. 6, Wis. 24)	245.0
Green Bay	
Prange's (H.C. Prange Co., Sheboygan, Wis.) (20 dept. stores)	$ 124.0
Madison	
Yost's Bros., Inc. (8 spec. stores)	6.5
Marinette	
Lauerman Bros. Co. (5 Wis. gen. mdse. stores)	6.0
Milwaukee	
Boston Stores (Acquired from Federated by P.A. Bergner, Milwaukee, in January 1985. 8 Wisc. dept. stores)	148.9
Milwaukee flagship store	30.0
Gimbels-Midwest (Batus Inc., N.Y., N.Y.)(9 dept. stores in Wis.)	200.0
Wisconsin Rapids	
Johnson Hills Dept. Stores (3 spec. stores)	10.0

SOUTH

ALABAMA

Birmingham	
Parisian Inc. (11 spec. stores in Ala.)	167.0
(Parisian opened a store in Columbus, Ga. in November 1985. It will open an additional Birmingham, Ala. store in February 1986 in Hamilton Place Mall, and a Chattanooga, Tenn. store in the Fall of 1987)	
Pizitz, Inc. (12 Ala. stores)	100.0
Florence	
Rogers, Inc.' (3 spec. stores)	9.0
Mobile	
C.J. Gayfer & Co., Inc., Springdale Plaza (Mercantile Stores, New York, N.Y. (11 dept. stores: Ala. 2, Fla. 6, Miss. 3)	300.0
Montgomery	
Gayfers/Montgomery Fair (Mercantile Stores, New York, N.Y.) (6 dept. stores: Ala. 4, Ga. 2)	140.0
James Stores (8 spec. stores)	6.0

ARKANSAS

El Dorado	
J.A. West Co. (15 jr. dept. stores in Ark., La., Mo., Okla., Tex.)	25.0
Fort Smith	
Boston Store Dry Goods Co. (6 jr. dept. stores in Ark., La., Tex., incl. 3 under the White House name, 2 Boston Stores, 1 Gus Mayer store)	34.0
Hunt Dry Goods Co. (8 gen. mdse. stores: Ark. 6, Okla. 1, Tex. 1)	12.0

DEPARTMENT/SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
ARKANSAS	
Little Rock	
M. M. Cohn (12 spec. stores in Ark., Okla., Tenn.)	50.0+
Dillard Dept. Stores, Little Rock Div. (Dillard Dept. Stores, Inc., Little Rock, Ark.) (17 stores: Ark. 6, La. 4, Tenn. 4, Tex. 3)	277.0
Park Plaza	41.0
DISTRICT OF COLUMBIA	
Garfinckel's (Allied Stores, New York, N.Y.) (10 spec. stores: D.C. 2, Md. 3, Va. 5)	110.0
Flagship stores, Washington, D.C.	30.0+
Hecht's (May Department Stores Co., St. Louis, Mo.) (23 dept. stores: D.C. 1, Md. 16, Va. 6)	531.9
(The downtown Washington store was closed and headquarters were moved to a new store in the Metro Center which opened November 4, 1985. The 1st year volume for this store is expected to reach $50 million.)	
(The Hecht Co. will open a store at Owings Mill Town Center, Md., in August 1986 and in Glen Burnie, Md. in October 1986)	
Woodward & Lothrop (15 dept. stores: D.C. 1, Md. 10, Va. 4, plus a Clearance Store) (Acquired in 1984 by Taubman Holdings, a Detroit, Mich. developer)	451.3
Flagship store, downtown Washington D.C., (renovated in 1985)	55.0
FLORIDA	
Bradenton	
Beall's Dept. Stores, Inc. (28 spec. stores in Fla.)	75.0
Jacksonville	
Furchgott's of Florida (3 spec. stores)	25.0
May-Cohens (May Department Stores, St. Louis, Mo.) (6 Fla. dept. stores)	69.4
Miami-Palm Beach-Fort Lauderdale Area	
Burdine's (Federated Dept. Stores, Cincinnati, Ohio) (28 dept. stores in Fla.)(Boynton Beach, Fla. store opened in 1985)	691.5
JByron's Department Stores (Jack Eckerd Corp., Clearwater, Fla.) (57 dept. stores in Fla.)	220.5
(It has been reported that JByron's will be sold to Amcena Corp., N.Y.)	
Jordan Marsh-Florida (Allied Stores, New York, N.Y.) 15 dept. stores in Fla.	260.0
(A Coral Springs, Fla. store was opened in 1985)	
Lord & Taylor (Lord & Taylor, New York, N.Y.) (5 Fla. stores)	
Adventura Mall	10.0
Fort Lauderdale Galleria	17.0
Cutler Ridge, South Miami	12.0
Coral Square and Palm Beach Mall	20.0
(2 stores, Miami International Mall in West Miami and Boynton Beach Mall, Palm Beach County, were opened in 1985. Each is expected to reach a volume of $20 million within 5 years.)	

(Other New York stores with operations in the Miami area include Bloomingdales, Saks Fifth Avenue and Macy's.)

DEPARTMENT/SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
FLORIDA	
Pensacola	
Great Day Family Stores (18 stores: Ala. 4, Fla. 14)	$ 5.0
Tampa-St. Petersburg	
Robinson's of Florida (Associated Dry Goods, New York, N.Y.) (7 dept. stores in Fla.) (A store was opened February 1985 in Fort Meyers; a replacement store was opened in Naples in the Fall of 1985. Three additional Fla. stores are scheduled for opening in 1986)	94.0
Maas Brothers, Inc. (Allied Stores, New York, N.Y.) (19 dept. stores in Fla.)	320.0
Winter Park	
Ivey's-Florida (Batus Inc., New York, N.Y.) (12 dept. stores in Fla.)	105.0
GEORGIA	
Atlanta	
Davison's (Macy's Atlanta) (14 dept. stores: Ga. 13, S.C. 1) (Macy's Midwest, Kansas City, was merged with Davison's in February 1985 and re-named Macy's Atlanta division. 4 Ohio stores plus a warehouse were sold to Elder Beerman in August 1985. Macy's Atlanta opened its 1st Alabama store, in Riverchase Galleria, in February 1985. A store in Atlanta and in New Orleans will be opened in 1986.)	350.0
H. Kessler & Co. (6 Ga. stores plus a wholesaling operation)	14.0
Rich's (Federated Dept. Stores, Cincinnati, Oh.) (17 dept. stores: Ala. 2, Ga. 13, S.C. 2, plus Outlet Home Store, Atlanta) (A 14th Atlanta store, in Town Center, will be opened in 1986) (Rich's also operates 31 Richway Discount Stores which had a 1984 volume totaling $432 million.)	602.1
Sunshine Department Stores (6 gen. mdse. stores)	7.0
Augusta	
J.B. White & Co. (Mercantile Stores, New York, N.Y.) (8 stores: Ga. 5, S.C. 3)	120.0
Columbus	
J.A. Kirvan Co. (3 spec. stores)	10.0
Kiralvy's (5 spec. stores)	5.0
Duluth	
Parson's, Inc. (3 gen. mdse. stores)	8.0
LaGrange	
Mansour's, Inc. (1 jr. dept. store)	7.0
Savannah	
Levy's of Savannah, Inc. (Allied Stores, New York, N.Y.) (2 spec. stores)	7.0

DEPARTMENT/SPECIALTY STORES

SOUTH

	APPROX. SALES (Millions of $)
KENTUCKY	
Ashland	
C.H. Parsons Co. (1 jr. dept. store)	$ 7.0
Lexington	
Embry & Co. (5 spec. stores)	
McAlpin Co. (Mercantile Stores Co., New York, N.Y. (2 jr. dept. stores)	20.0 20.0
Louisville	
J. Bacon & Son (Mercantile Stores, New York, N.Y. (6 dept. stores: Ind. 1, Ky. 5)	130.0
Behr Stores (34 spec. stores in Ala., Ar., Ga., Ky. N.C., S.C., Tenn.)	20.0
Lerman Bros., Inc. (20 spec. stores in Ind. and Ky.	10.0
Shapira Corp. (The Louisville Store/The People's Store/ Town & Country) (19 spec. stores)	16.0
Snyders, Inc. (8 jr. dept. stores)	42.0
Stewart Dry Goods (Associated Dry Goods, New York, N.Y.) (7 dept. stores: Ind. 1, Ky. 6) (To be merged with L.S. Ayres, Indianapolis, effective Jan. 2, 1986. The names of the stores may be changed to Ayres.)	75.0
Whitesburg	
Dawahares Dept. Stores, Inc. (2 Ky. dept. stores; also 16 spec. stores and 3 furniture stores)	38.0
LOUISIANA	
Alexandria	
Wellan's (3 gen. mdse. stores in La.) (Acquired Palais Royal, a three unit dept. store based in Shreveport, La. in December 1985; Palais Royal, with an estimated annual volume of $13 mil., will continue to operate as a separate entity.)	12.0
Baton Rouge	
Goudchaux/Maison Blanche, Inc. (The New Maison Blanche) (7 dept. stores in La.)	207.6
Lafayette	
Abdalla's Lafayette Inc. (2 spec. stores)	12.5
Lake Charles	
Many-Nicholson Dry Goods (10 gen. mdse. stores)	10.7
Muller Co., Ltd. (Allied Stores Corp., New York, N.Y.) (1 store)	7.0
Minden	
West & Co. of La., Inc. (25 gen. mdse. stores in Ala., Ark., La., Miss., Tex. plus 7 discount centers)	40.0
New Orleans	
The Leon Godchaux Clothing Co. (7 spec. stores plus 5 Kiddos stores in La., Miss.)	38.0
D.H. Holmes Co. (16 dept. stores: Ala. 1, La. 13, Miss. 2)	271.7
Krauss Co., Ltd. (1 dept. store)	23.0

DEPARTMENT/SPECIALTY STORES

SOUTH

	APPROX. SALES (Millions of $)
LOUISIANA	
Shreveport	
Rubenstein's, Inc. (4 jr. dept. stores in La.)	$ 11.0
MARYLAND	
Baltimore	
Brager-Gutman (2 gen. mdse. stores)	6.0
L. Epstein & Sons (8 jr. dept. stores in Md.)	32.0
Hutzler's (11 dept. stores including 4 Hochschild, Kohn stores in Greater Baltimore area which were acquired in 1984).	130.0
(A replacement Baltimore flagship store was opened by Hutzler's in April 1985, which is their 3rd largest store, after Townson, Md. and Westview, Md.)	
(In October 1984, Hutzler's acquired the Sara Fredericks (Boston) specialty chain with stores in Fla., Mass., N.Y. and an annual volume of $15 million. In September 1985, an agreement was reached to buy B. Altman Co. (New York) retail operations from an investor group which is handling the real estate operations involved in the sale of Altman's.)	
MISSISSIPPI	
Jackson	
McRae's, Inc. (14 dept. stores: Fla. 1, Miss. 13)	166.7
NORTH CAROLINA	
Charlotte	
Ivey's-Carolinas (Batus Inc., New York, N.Y.) (13 dept. stores: N.C. 12, S.C. 1)	120.0
Elkin	
Spainhour's Store (7 N.C. spec. stores)	6.5
Rocky Mount	
Baldwin Stores Corp. (11 stores in N.C.)	5.0
Whiteville	
Leder Bros. Dept. Stores (10 stores, including Leder-Potter Stores in N.C. and S.C.)	7.0
Winston-Salem	
Davis, Inc. (3 N.C. stores)	8.0
Mother & Daughter Stores (8 N.C. stores)	5.0
OKLAHOMA	
Checotah	
Sharpe Dept. Store (20 stores in Okla., including a Ben Franklin store)	8.0

DEPARTMENT/SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
OKLAHOMA	
Oklahoma City	
John A. Brown Co. (6 dept. stores in Okla. and Tex.) (Acquired by Dillard Department Stores Central Division, Fort Worth, Tex., in January 1985. Dillard's exchanged the Crossroad Shopping Center store for a Federated store, Bullock's, Christown Mall, Phoenix; 2 John A. Brown Oklahoma City stores were sold to Sanger-Harris. The Woodland Hills Mall, Tulsa, store was sold by Dillard to J.C. Penney Co. Dillard will operate under its name the former John A. Brown stores in Penn Square, Oklahoma City, and in Utica Square, Tulsa.)	$ 82.0
Langston Co. (3 spec. stores)	10.0
Tulsa	
Froug's Inc. (12 spec. stores: Ark. 1, Okla. 11)	20.0
Renberg's (4 spec. stores)	38.0
Sanger-Harris (Sanger-Harris, Dallas) (2 Tulsa dept. stores, incl. store opened in the Fall of 1984)	24.0
The Vandever Co., Southroad Mall (The Dunlap Co., Fort Worth, Tex.) (2 Okla. spec. stores)	11.0
SOUTH CAROLINA	
Anderson	
Gallant-Belk (Belk Stores Services, Inc., Charlotte, N.C.) (4 jr. dept. stores: Ga. 2, S.C. 2)	18.0
Charleston	
James F. Condon & Sons (1 dept. store)	6.0
Kerrison's Dept. Stores (3 S.C. dept. stores)	10.0
Columbia	
James L. Tapp Co. (4 S.C. spec. stores)	12.0
J.B. White & Co. (Mercantile Stores, New York, N.Y.) (2 spec. S.C. stores)	22.0
Greenville	
Meyers-Arnold Co. (9 dept. stores: Ga. 2, N.C. 2, S.C. 5)	27.0
Myrtle Beach	
Chapin Co. (1 gen. mdse. store)	12.0
Spartanburg	
Belk-Hudson (Belk Stores Services, Inc., Charlotte, N.C.) (4 S.C. jr. dept. stores)	12.0
TENNESSEE	
Alcoa	
Proffitt's Dept. Stores (5 Tenn. depts. stores)	50.0
Chattanooga	
Loveman's (5 Tenn. dept. stores)	32.0

DEPARTMENT/SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
TENNESSEE	
Jackson	
Kisber's Dept. Store, Inc. (2 Tenn. spec. stores)	$ 6.0
Knoxville	
Millers (Allied Stores Corp., New York, N.Y.) 13 dept. stores: Ga. 1, Tenn. 11, Va. 1)	100.0
Ira A. Watson Co. (19 stores: Ala. 1, Ky. 9, Tenn. 4, Va. 2, W.Va. 3)	50.0
Madison	
McClure's Stores, Inc., Madison Square (3 Tenn. spec. stores)	10.0
Memphis	
Goldsmith's (Federated Department Stores, Cincinnati, Ohio) (6 dept. stores in Tenn.)	164.0
Nashville	
Cain-Sloan (Allied Stores Corp., New York, N.Y.) (4 Tenn. dept. stores)	60.0
The Castner Knott Dry Goods Co. (Mercantile Stores, New York, N.Y.) (11 dept. stores: Ala. 3, Ky. 1, Tenn. 7)	190.0
TEXAS	
Abilene	
Thornton's Dept. Stores, Inc. (P.N. Hirsch & Co., St. Louis, Mo.) (4 jr. dept. stores in Tex.)	11.0
Austin	
Scarbrough's (3 dept. stores in Tex.)	25.0
Beaumont	
The Fair, Inc. (23 spec. stores in Tex. and La.)	50.0
White House Co. (Boston Stores D.G. Co., Fort Smith, Ark.) (6 gen. mdse. stores: Ark. 2, La. 1, Tex. 3 Also operates Gus Mayer store in Beaumont, Tex.)	40.0
Dallas	
Bloomingdale's (Bloomingdale's, New York, N.Y.) Valley View Center	50.0
Dillard's, Valley Vino (Dillard's-San Antonio Div.) (Store enlarged)	50.0
Joske's-Dallas (Allied Stores, New York, N.Y.) (In 1985 Joske's-Dallas was made the headquarters for a consolidation involving Joske's-Dallas/Houston/San Antonio and comprising 27 stores)	430.0
Neiman-Marcus (Carter Hawley Hale, Los Angeles, Calif.) (21 spec. stores: Cal. 4, D.C. 1, Fla. 2, Ga. 1, Ill. 3, Mass. 1, Mo. 1, Nev. 1, N.Y. 1, Tex. 6)	620.0
3 Southern Ca. stores	91.0
(A store in Palo Alto, Ca. was opened in August 1985. It is expected to reach a volume of $20 million in its first year.)	

DEPARTMENT/SPECIALTY STORES

SOUTH

TEXAS

	APPROX. SALES (Millions of $)
Dallas (continued)	
Sanger-Harris (Federated Department Stores, Cincinnati, Oh.) (16 dept. stores in Tex. and Okla. plus 2 Levy's, Tucson, Ariz. spec. stores)	$ 447.4
(Sanger-Harris acquired 2 Oklahoma City John A. Brown stores from Dillard Dept. Stores Co. in May 1985.)	
(Macy's New York opened a store in the Dallas Galleria in October 1985, which is expected to exceed $50 million in its first year.)	
El Paso	
The White House (The Dunlap Co., Forth Worth, Tex.) (2 spec. stores: Tex. 1, N.M. 1)	10.0
Fort Worth	
Dillard Dept. Stores, Fort Worth Div. (Dillard Dept. Stores, Inc. Little Rock, Ark.) (31 stores: Ka. 2, Mo. 1, Okla. 13, Tex. 15, including 4 former John A. Brown, Okla. City/Tulsa stores acquired in 1984)	375.0
The Dunlap Co. (operates 33 Tex. department and specialty stores under names of Stripling & Cox, Lintz, Hirsch Bros., White House, etc.)	125.0
Monnig's (16 department and specialty stores in Texas)	60.0
Pace, Newsom & Moates, Inc. (37 general mdse. stores in Texas)	40.0
Houston	
Craig Stores (16 spec. stores plus 5 Buelow Stores)	50.0
Foley's (Federated Dept. Stores, Cincinnati, Oh.) (16 dept. stores in Tex.) (Plans to open a Corpus Christi, Tex. store in Spring 1987)	682.4
(Macy's New York opened a 3rd Houston store, in Baybrook Mall, in July 1985; a 4th will be opened in Houston Galleria in the Fall of 1986.)	
(Sakowitz Inc. which had 15 spec. stores in Ariz., Tex., Okla., and had a volume of $190 million in 1983, filed for reorganization under Chapter 11 on August 1, 1985. Five stores are to to closed, including stores in Dallas; Scottsdale, Ariz.; Midland, Tex.; and 2 Houston stores. The Tulsa store was sold, leaving 4 Houston area stores and 2 boutiques.)	
Jacksonville	
White & Mays (55 gen. mdse. stores in Tex. and La.)	18.0
Lubbock	
Hemphill-Wells Co. (4 Tex. gen. mdse. stores)	32.0

DEPARTMENT/SPECIALTY STORES

SOUTH	APPROX. SALES (Millions of $)
TEXAS	
San Antonio	
Dillard Department Stores, San Antonio Division (Dillard Department Stores, Little Rock, Ark.) (22 stores: N.M. 3, Tex. 19)	$ 315.0
Frost Brothers (Manhattan Industries, New York, N.Y.) (12 spec. stores in Tex.)	126.0
LaFeria Dept. Store (6 jr. dept. stores in Tex.)	17.0
(Saks Fifth Ave. opened a store in the North Star Mall, San Antonio, in November 1985. Marshall Field will open a San Antonio store in November 1986 which is expected to reach a volume of $20 million in its first year.)	
Trinity	
Baskin's Dept. Stores, Inc. (4 gen. mdse. stores)	5.0
Waco	
R.E. Cox Co. (1 gen. mdse. store)	11.0
Goldstein-Migel, Inc. (1 spec. store)	5.0
Wichita Falls	
McClurkan's Dept. Store (2 gen. mdse. stores in Tex.)	10.0
VIRGINIA	
Arlington	
Morton's (6 spec. stores: D.C. 3, Md. 3)	10.0
Martinsville	
Globman's, Inc. (6 jr. dept. stores: N.C. & Va.)	14.0
Norfolk	
Hess's Rices Nachmans (formerly Rices Nachmans) (Sold by Phillips-Van Heusen Corp., New York, N.Y. to Hess's Department Stores, Inc. (Crown American) in February 1985, and 3 out of 8 stores were closed; 5 new stores were opened in February 1985 in Va.)	30.0
Smith & Welton, Inc. (8 jr. dept. stores in Va.)	18.0
Richmond	
Miller & Rhoads (Allied Stores Corp., New York, N.Y.) (22 dept. stores: N.C. 5, Va. 17)	130.0
(A Roanoke store was opened in 1985)	
Southern Dept. Stores, Inc. (4 gen. mdse. stores in Va.)	6.0
Thalhimer Bros., Inc. (Carter Hawley Hale Stores, Inc., Los Angeles, Ca.) (25 dept. stores: N.C. 9, S.C. 1, Tenn. 1, Va. 14)	315.0
(Plans to open a store in Roanoke, Va., and in Charleston, S.C.)	

DEPARTMENT/SPECIALTY STORES

	APPROX. SALES (Millions of $)
SOUTH	
WEST VIRGINIA	
Charleston	
A.W. Cox Dept. Store Co. (15 spec. stores: Ky. 5, Oh. 1, W.Va. 9)	$ 8.5
Parkersburg	
Dils Bros. & Co. (2 W.Va. dept. stores)	7.5
Wheeling	
Stone & Thomas, Inc. (15 dept. stores: W. Va. 15, Oh. 1)	100.0+
WEST	
ARIZONA	
Douglas	
Phelps Dodge Mercantile Co. (5 gen. mdse. stores in Ariz.)	22.0
Flagstaff	
Babbitt Bros. Trading Co. (10 gen. mdse. stores in Ariz.)	20.0
Mesa/Tempe/Scottsdale	
The Broadway-Southwest, Mesa (Carter Hawley Hale, Los Angeles, Ca.) (10 dept. stores: Ariz. 7, Nev. 2, N.M. 1)	165.0
Dillard Dept. Stores, Phoenix, Div. (Dillard Dept. Stores, Little Rock, Ark.) (12 dept. stores: Ariz. 9, Nev. 3)	160.0
Goldwater's, Scottsdale (Associated Dry Goods, New York, N.Y.) (9 dept. stores: Ariz. 7, Nev. 1, N.M. 1)	112.0
Tucson	
Levy's (Sanger-Harris Div. of Federated Dept. Stores, Cincinnati, Oh.) (2 Tucson spec. stores)	38.0
CALIFORNIA	
Bakersfield	
Brock's Dept. Store (2 dept. stores)	20.0
Carson	
The Boston Stores, Inc. (20 spec. stores: Ariz. 4, Calif. 16)	25.0
Eureka	
Daly's (4 spec. stores)	10.0
Fresno	
E. Gottschalk & Co. (9 dept. stores in Ca., incl. Fair. Also operates Bobbie West and Village East Specialty Stores)	106.0
Los Angeles/Long Beach Area	
Broadway-Southern California (Carter Hawley Hale, Los Angeles, Ca.) (40 dept. stores in Ca.) (2 stores were scheduled for 1985 openings in San Diego County in 1985 and a store is to be opened in the South Coast Plaza in 1986.)	945.0

DEPARTMENT/SPECIALTY STORES

WEST	APPROX. SALES (Millions of $)
CALIFORNIA	
Los Angeles/Long Bear Area (continued)	
Buffum's Inc., Long Beach (David Jones Ca., Inc., Long Beach, Ca.) (14 jr. dept. stores, 4 spec. stores)	$ 115.0
Bullock's Southern California (Federated Dept. Stores, Cincinnati, Oh.) (22 dept. stores: Ariz. 2, Ca. 19, Nev. 1, 6 Bullock's Wilshire spec. stores in Ca.)	673.8
Bullock's (22 dept. stores)	594.0
(Bullock's Christown Mall, Phoenix, Ariz. store was exchanged by Federated in May 1985 for a John A. Brown store in Oklahoma City. This store, plus a 2nd Oklahoma City John A. Brown store, are to be operated by Sanger-Harris, Dallas.)	
I. Magnin (I. Magnin, San Francisco, Ca.) (10 Southern Ca. spec. stores)	102.0
May Co. California, North Hollywood (May Dept. Stores, St. Louis, Mo.) (34 Ca. dept. stores)	786.4
Laurel Plaza (became May Co. flagship store in 1984)	40.0
(Montebello, Ca. store opened in 1985. For 1986, stores are planned for Escondido in San Diego County and downtown Los Angeles.)	
Neiman-Marcus (Neiman Marcus, Dallas, Tex.) (3 Southern Ca. spec. stores)	91.0
Beverly Hills store	51.0
Nordstrom's (Nordstrom, Inc. Seattle, Wash.) (6 Southern Ca. spec. stores)	270.0
(Galleria at South Bay store, opened in March 1985, is expected to reach a volume of $40 million in its first year.)	
J.W. Robinson (Associated Dry Goods, New York, N.Y.) (21 Ca. depts. stores)	525.0
La Cumbre Plaza, Santa Barbara, Ca. (stores to be enlarged)	40.0
(San Diego, Ca., store opened in 1985; three stores will be opened in 1986: Escondido, Costa Mesa, Palm Desert)	
Saks Fifth Avenue (Saks Fifth Avenue, New York, N.Y.) (6 Southern Ca. spec. stores)	95.0
Beverly Hills	32.0
(Opened a Palm Springs replacement store in November 1985. Estimated first year volume of $10 million).	
Pacific Grove	
Holman's Dept. Store (1 store)	10.0
Sacramento	
Weinstock's (Carter Hawley Hale Stores, Inc., Los Angeles, Ca.) (12 dept. stores: Ca. 8, Nev. 1, Utah 3)	220.0
San Bernadino	
Harris (5 gen. mdse. stores in Ca.)	50.0
San Diego	
Walker Scott Co. (14 gen. mdse. stores in Ca.) (2 stores--in San Diego and in LaJolla--were closed in February 1985.)	40.0

(In August 1985, the Horton Plaza Mall, San Diego, was opened. The Nordstrom anchor is expected to reach a 1st year volume of $25- to $30 million, J.W. Robinson, $22 million. The opening of The Broadway has been delayed, but this store is expected to reach a sales volume of $15 million in its 1st year of operation.)

DEPARTMENT/SPECIALTY STORES

WEST

	APPROX. SALES (Millions of $)
CALIFORNIA	
San Francisco/Oakland/Palo Alto	
Emporium Capwell (Carter Hawley Hale, Los Angeles, Ca.) (22 dept. stores in Ca.)	$ 660.0
Macy's California (R.H. Macy, New York, N.Y.) (25 dept. stores in Ca.) (The Union Square flagship store is expected to have a volume of over $70 million in 1985. Stores in the Solano Mall (Fairfield) and in Corte Madera were opened in August 1985.)	1,135.0
I. Magnin (Federated Dept. Stores, Cincinnati, Oh.) (26 spec. stores: Ariz. 1, Ca. 19, Ill. 3, Md. 1, Ore. 1, Wash. 1) (A Sacramento, Calif. store was opened in August 1985.)	309.7
Neiman-Marcus (Neiman-Marcus, Dallas, Tex.) (1 spec. store in San Francisco) (A store in Palo Alto was opened in August 1985, which is expected to reach a volume of $20 million in its 1st full year.)	30.0+
Nordstrom (4 Northern Ca. spec. stores) (A store at Stevens Creek will be opened in 1986.)	150.0
Saks Fifth Ave. (Saks Fifth Ave., New York, N.Y.) (1 spec. store)	35.0
San Luis Obispo	
Riley's Dept. Store, Inc. (4 gen. mdse. stores in Ca.)	10.0
San Mateo	
Levy Bros. Dept. Stores (5 gen. mdse. stores in Ca.)	9.0
Santa Cruz	
Samuel Leask & Sons (3 gen. mdse. stores in Ca.)	9.0
Santa Monica	
H.C. Henshey Co. (2 gen. mdse. stores in Ca.)	10.0
Santa Rosa	
Rosenberg's (1 spec. store)	10.0
Watsonville	
Charles Ford Co. (5 dept. stores and 5 spec. stores in Ca.)	25.0
Whittier	
Hinshaw's Dept. Stores, Inc. (2 dept. stores in Ca.)	28.0
COLORADO	
Denver	
The Denver Dry Goods Co. (Associated Dry Goods, New York, N.Y.) (12 dept. stores in Colo.)	145.0
Joslin's, Englewood (Mercantile Stores, New York, N.Y.) (10 dept. stores: Col. 9, Wyo. 1)	165.0
May D & F (May Dept. Stores, Denver Colo.)(12 Colo. dept. stores)	177.6
Neusteter's (4 spec. stores in Colo.)	20.0

(The Broadway-Southwest will open 2 stores in 1985--Villa Italia and Cinderella City malls. A volume of $20 million each is expected on an annual basis.)

DEPARTMENT/SPECIALTY STORES

WEST

	APPROX. SALES (Millions of $)
HAWAII	
Honolulu	
Liberty House (Amfac, Honolulu) (50 stores)	$ 207.5
IDAHO	
Boise	
LaMode, Ltd. (2 spec. stores)	8.0
OREGON	
Eugene	
Emporium Inc. (13 gen. mdse. stores: Ore. 12, Wash. 1)	55.0
Klamath Falls	
Miller's Dept. Store (Idaho Dept. Store Co., Caldwell, Id.) (1 dept. store)	13.5
Portland	
Meier & Frank (May Dept. Stores Co., St. Louis, Mo.) (7 dept. stores: Ore. 6, Wash. 1)	211.8
UTAH	
Salt Lake City	
Dahle's (20 spec. stores in Utah, Mont., Colo., Nev., Ca., Wyo.)	15.0
ZCMI Department Store (Zion's Co-Operative Mercantile Institution) (9 dept. stores: Id. 2, Ut. 7)	159.6
WASHINGTON	
Seattle/Everett/Spokane/Tacoma	
The Bon (Allied Stores, New York, N.Y.) (37 dept. stores plus a Seattle Home Store: Id. 7, Mont. 3, Ore. 6, Utah 3, Wash. 17, Wyo. 1)	470.0
Frederick & Nelson, Seattle (Batus Inc., New York, N.Y.) (15 dept. stores: Ore. 7, Wash. 8)	240.0

DEPARTMENT STORE VOLUME LEADERS

Following is a listing of leading traditional department stores, showing the buying or divisional headquarter location as of the end of 1984 and the best available information on sales for the year 1984 (or closest fiscal period) attributed to each headquarter operation. The volume figures cover sales of all stores (confined to department stores where possible) operated by the listed store. Not included in this compilation are national chains (such as Sears, Ward and Penny), promotional chains, and discount houses (see section on MAJOR NATIONAL/REGIONAL CHAINS).

STORES WITH TOTAL SALES OF $100 MILLION OR MORE

	SALES VOLUME (Millions of $)
Dayton Hudson Department Stores, Minneapolis, Minn. (Dayton Hudson Corp.) (36 stores)	1,396.3
Macy's New York, New York, N.Y. (R.H. Macy) (21 department stores plus 4 clearance centers)	1,290.0
Macy's California, San Francisco, Ca. (R.H. Macy) (25 department stores plus 2 clearance centers)	1,135.0
Bamberger's, Newark, N.J. (R.H. Macy) (23 department stores plus 3 furniture centers)	1,128.0
Broadway Southern California, Los Angeles, Ca. (Carter Hawley Hale) (40 stores)	945.0
Bloomingdales, New York, N.Y. (Federated) (14 stores)	903.0
May Co., California, Los Angeles, Ca. (May Department Stores) (34 stores)	786.4
Abraham & Straus, Brooklyn, N.Y. (Federated) (15 stores)	781.0
Marshall Field, Chicago, Ill. (Batus Inc.) (21 stores)	750.0
Lord & Taylor, New York, N.Y. (Associated Dry Goods) (41 stores)	695.0
Burdine's, Miami, Fla. (Federated) (28 stores)	691.5
Foley's, Houston, Tex. (Federated) (16 stores)	682.4
Emporium Capwell, San Francisco, Ca. (Carter Hawley Hale) (22 stores)	660.0
Rich's, Inc., Atlanta, Ga. (Federated) (18 stores)	602.1
Bullock's, Los Angeles, Ca. (Federated) (22 department stores, not including Bullock's Wilshire spec. stores)	594.0
Hecht's, Washington, D.C. (May Department Stores) (23 stores)	531.9
J.W. Robinson Co., Los Angeles, Ca. (Associated Dry Goods) (21 stores)	525.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH TOTAL SALES OF $100 MILLION OR MORE (continued)

	SALES VOLUME (Millions of $)
Jordan Marsh-New England, Boston, Mass. (Allied Stores) (17 stores)	$ 520.0
Gimbels-East, New York, N.Y. (Batus Inc.) (20 stores)	475.0
The Bon, Seattle, Wash. (Allied Stores) (37 stores plus Seattle Home Store)	470.0
F. & R. Lazarus, Columbus, Oh. (Federated) (17 stores)	453.4
Woodward & Lothrop, Inc., Washington, D.C. (15 stores)	451.3
Famous Barr, St. Louis, Mo. (May Department Stores) (16 stores)	450.9
Sanger-Harris, Dallas, Tex. (Federated) (18 stores)	447.4
Joske's-Dallas, Dallas, Tex. (Allied Stores) (27 stores--consolidation of Dallas, Houston, and San Antonio divisions)	430.0
Wanamaker's, Philadelphia, Pa. (Carter Hawley Hale) (16 stores)	430.0
Stern's, Paramus, N.J. (Allied Stores) (17 stores)	390.0
Shillito Rikes, Cincinnati, Oh. (Federated) (14 stores)	381.1
Strawbridge & Clothier, Philadelphia, Pa. (Allied Stores) (12 department stores)	380.5
Dillard's-Fort Worth Div., Fort Worth, Tex. (Dillard Dept. Stores) (31 stores)	375.0
Carson Pirie Scott & Co., Chicago, Ill. (21 stores in department store division)	369.0
Macy's Atlanta, Atlanta, Ga. (R.H. Macy) (26 stores)	350.0
L.S. Ayres, Indianapolis, Ind. (Associated Dry Goods) (18 stores)	329.0
Filene's, Boston, Mass. (Federated) (15 stores, not including separated Basement Division)	328.4
Kaufmann's, Pittsburgh, Pa. (May Department Stores) (11 stores)	327.4
Maas Bros., Tampa, Fla. (Allied Stores) (19 stores)	320.0
Dillard's-San Antonio Div., San Antonio, Tex. (Dillard Dept. Stores) (22 stores)	315.0
Thalhimer's, Richmond, Va. (25 stores)	315.0
C.J. Gayfer Co., Mobile, Ala. (Mercantile Stores) (11 stores)	300.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH TOTAL SALES OF $100 MILLION OR MORE (continued)

	SALES VOLUME (Millions of $)
McAlpin Co., Cincinnati, Oh. (Mercantile Stores) (7 stores)	$ 280.0
Dillard's-Little Rock Div., Little Rock, Ark. (Dillard Dept. Stores) (17 stores)	277.0
Hess's, Inc., Allentown, Pa. (Crown American Corp.) (32 stores)	273.6
D.H. Holmes Co., New Orleans, La. (16 stores)	271.7
Higbee's, Cleveland, Oh. (The Higbee Co.) (11 stores)	263.9
Jordan Marsh-Florida, Miami, Fla. (Allied Stores) (15 stores)	260.0
Kohl's Department Stores, Brookfield, Wis. (Batus Inc.) (34 stores)	245.0
Jacobson Stores, Jackson, Mich. (20 stores)	240.7
B. Altman, New York, N.Y. (Possible acquisition by Hutzler Bros.) (7 stores)	240.0
Frederick & Nelson, Seattle, Wash. (Batus Inc.) (15 stores)	240.0
Elder Beerman Stores Corp., Department Store Div., Dayton, Oh. (20 stores)	238.0
The May Co., Cleveland, Oh. (May Department Stores) (10 stores)	229.7
Boscov's Department Stores, Reading, Pa. (10 stores)	221.0
JByron's, Miami, Fla. (Jack Eckerd Corp.) (57 junior department stores)	220.5
P.A. Bergner, Peoria, Ill. (25 stores)	220.0
Weinstock's, Sacramento, Ca. (Carter Hawley Hale) (12 stores)	220.0
Meier & Frank, Portland, Ore. (May Department Stores) (7 stores)	211.8
Goudchaux/Maison Blanche, Baton Rouge, La. (7 stores)	207.6
Liberty House Hawaii, Honolulu, Hawaii (Amfac, Inc.) (50 stores)	207.5
Gimbels-Midwest, Milwaukee, Wis. (Batus Inc.) (9 stores)	200.0
G.Fox, Hartford, Conn. (May Department Stores) (8 stores)	193.0
Wieboldt Stores, Chicago, Ill. (Possible acquistion by WSI Acquisition Corp.) (13 stores)	191.2
Castner Knott Dry Goods Co., Nashville, Tenn. (Mercantile Stores) (11 stores)	190.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH TOTAL SALES OF $100 MILLION OR MORE (continued)

	SALES VOLUME (Millions of $)
Younkers, Des Moines, Ia. (Equitable of Iowa) (29 stores)	$ 188.6
Joseph Horne, Pittsburgh, Pa. (Associated Dry Goods) (13 stores)	185.0
Howland-Steinbach, White Plains, N.Y. (Supermarkets General) (29 stores)	182.5
Sibley's, Rochester, N.Y. (Associated Dry Goods) (14 stores)	180.0
May-D & F, Denver, Colo. (May Department Stores) (12 stores)	177.6
The Jones Co., Kansas City, Mo. (Mercantile Stores) (7 stores)	170.0
McRae's, Jackson, Miss. (14 stores)	166.7
The M. O'Neil Co., Akron, Oh. (May Department Stores) (10 stores)	165.8
Broadway-Southwest Division, Mesa, Ariz. (Carter Hawley Hale) (10 stores)	165.0
Gimbels, Pittsburgh, Pa. (Batus Inc.) (7 stores)	165.0
Joslin's, Englewood, Co. (Mercantile Stores) (10 stores)	165.0
Goldsmith's, Memphis, Tenn (Federated) (6 stores)	164.0
Dillard's-Phoenix Div., Tempe, Ariz. (Dillard Dept. Stores) (12 stores)	160.0
ZCMI (Zion's Co-operative Mercantile Institution), Salt Lake City, Ut. (9 stores)	159.6
Dillard's-St. Louis Div., St. Louis, Mo. (Dillard Dept. Stores) (11 stores)	150.0
Boston Store, Milwaukee, Wis. (Acquired from Federated by P.A. Bergner) (8 stores)	148.9
Denver Dry Goods, Denver, Co. (Associated Dry Goods) (12 stores)	145.0
Gayfer's, Montgomery, Ala. (Mercantile Stores) (6 stores)	140.0
J. Bacon & Son Co., Louisville, Ky. (Mercantile Stores) (6 stores)	130.0
Hutzler's, Baltimore, Md. (11 dept. stores)	130.0
Miller & Rhoads, Richmond, Va. (Allied Stores) (22 stores)	130.0
Prange's, Green Bay, Wis. (H.C. Prange Co.) (20 department stores)	124.0
Ivey's-Carolinas, Charlotte, N.C. (Batus Inc.) (13 stores)	120.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH TOTAL SALES OF $100 MILLION OR MORE (continued)

	SALES VOLUME (Millions of $)
Donaldson's, Minneapolis, Minn. (Allied Stores) (9 stores)	120.0
J.B. White, Augusta, Ga. (Mercantile Stores) (8 stores)	120.0
Hahne & Co., Newark, N.J. (Associated Dry Goods) (8 stores)	120.0
Buffum's, Long Beach, Ca. (14 jr. department stores, 4 spec. stores)	115.0
Goldwater's, Scottsdale, Ariz. (Associated Dry Goods) (9 stores)	112.0
Adam, Meldrum & Anderson, Buffalo, N.Y. (10 stores)	110.0
E. Gottschalk, Fresno, Ca. (9 stores)	106.0
Ivey's-Florida, Winter Park, Fla. (Batus Inc.) (12 stores)	105.0
Stone & Thomas, Wheeling, W.Va. (15 stores)	100.0+
The Lion Dry Goods Co., Toledo, Oh. (Mercantile Stores) (2 department stores and 2 specialty stores)	100.0
Pizitz, Birmingham, Ala. (12 stores)	100.0
Read's, Bridgeport, Conn. (Allied Stores) (6 stores)	100.0
Millers, Inc., Knoxville, Tenn. (Allied Stores) (13 stores)	100.0

DEPARTMENT STORE VOLUME LEADERS

STORES WITH SALES OF $50 MILLION TO $99 MILLION

	SALES VOLUME (Millions of $)
J. L. Brandeis & Sons, Omaha, Neb. (10 stores)	$ 95.0
Robinson's of Florida, St. Petersburg, Fla. (Associated Dry Goods) (7 stores)	94.0
Crowley, Milner and Company, Detroit, Mich. (Oakland Holding Co.) (9 stores)	92.9
Strouss, Youngstown, Oh. (May Department Stores) (9 stores)	92.6
William H. Block & Co., Indianapolis, Ind. (Allied Stores) (11 stores)	90.0
Mays (J.W. Mays, Inc.), Brooklyn, N.Y. (4 stores)	84.7
Pomeroy's, Inc., Levittown, Pa. (Allied Stores) (8 stores)	80.0
Stewart Dry Goods, Louisville, Ky. (Associated Dry Goods) (7 stores)	75.0
G.R. Herberger's, St. Cloud, Minn. (25 stores)	75.0
May-Cohens, Jacksonville, Fla. (May Department Stores) (6 stores)	69.4
Sage-Allen, Hartford, Conn. (12 stores)	66.0
Cain-Sloan, Nashville, Tenn. (Allied Stores) (4 stores)	60.0
Powers Dry Goods, Minneapolis, Minn. (Acquired by Allied Stores from Associated Dry Goods) (7 stores)	50.0

MAJOR NATIONAL/REGIONAL CHAINS

The following companies have major positions in general merchandise/apparel retailing--including the operation of traditional department stores, discount stores and off-price retail outlets, apparel specialty stores and catalog operations. Many of these chains are also engaged in nonrelated activities, including the operation of supermarkets or of specialized hard goods outlets, manufacturing, wholesaling or diverse activities such as the operation of auto repair shops, television stations, etc. The sales volumes reported are total net sales covering all operations unless otherwise noted, and are for the latest fiscal period or period reflecting 1984 volume.

Retail Chain	SALES (Millions of $)
Alexander's, Inc., New York, N.Y. (15 New York area stores)	$ 520.0
Allied Stores Corp., New York, N.Y. (Including specialty stores: Brooks Brothers volume estimated at $220 million; Ann Taylor with volume over $100 million)	3,970.5
Almy Stores, Inc., Boston, Mass. (Acquired by Stop & Shop in January 1985)	97.0
Amcena Corp., New York, N.Y. (a privately-owned company) (Owns Ohrbach's, N.Y., 12 stores with a volume of $200 million; Miller's Outpost; Kreega & Son; Maurice's; The Lodge at Harvard Square; and the Eastern Mountain Sports Chain) (Plans to purchase JByrons, Miami, from Jack Eckerd Corp.)	(total sales volume not available)
Ames Department Stores, Inc., Rocky Hill, Conn. (Acquired G.C. Murphy Co. in April 1985--1984 volume of $913.3 million)	822.0
Amfac, Inc., Honolulu, Hawaii (Retail Group sales: $272 million, including Liberty House of Hawaii, $207.5 million and VFO stores, $33 million)	2,392.4
C.R. Anthony & Co., Oklahoma City, Okla.	430.0
Associated Dry Goods Corp., New York, N.Y. (Includes 103 Caldor stores with a volume of $1.3 billion; 72 Loehmann's at $308 million; 236 department store units with a volume totaling $2.5 billion)	4,106.6
Batus Inc., Retail Divisions, New York, N.Y.	3,374.3
Beall-Ladymon, Shreveport, La.	85.0
L.L. Bean, Freeport, Me.	254.0
Belk Stores, Charlotte, N.C.	1,850.0
Bradlees, Braintree, Mass. (Division of The Stop & Shop Companies) (132 discount dept. stores)	1,404.6
Brown Group, Inc., St. Louis, Mo. Specialty Retailing:	308.7
Burlington Coat Factory, Burlington, N.J. (68 stores)	310.0
CWT Specialty Stores, Inc. (Cherry Webb and Touraine), South Attleboro, Mass. (50 stores in six New England states, more than half in Massachusetts)	80.5
Carson Pirie Scott & Co., Chicago, Ill. (Retail Group volume: $593.8 million; Department store volume: $369 million) (Acquired 19 Pants Corral stores from Giant Foods in June 1985--to be added to the 275 County Seat specialty stores acquired in May 1984 from Super Valu Stores)	1,177.2
Carter Hawley Hale Stores, Inc., Los Angeles, Ca. (Department store division sales: $2.7 billion; specialty store sales: $974.4 million, including Contempo Casuals with sales of $90 million)	3,724.3
Charming Shoppes, Inc., Bensalem, Pa.	297.3
Clothestime, Inc., Anaheim, Ca. (160 specialty stores in the western U.S.)	98.0

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	SALES (Millions of $)
Danners, Inc. (Three-D), Indianapolis, Ind.	$ 189.0
Dayton Hudson Corp., Minneapolis, Minn. (Includes sales of Mervyn's, $2.1 billion; Target Stores, $3.5 billion; the department store division, $1.5 billion; specialty stores, $0.8 billion)	8,009.0
Dillard Department Stores, Inc., Little Rock, Ark. (93 stores) (Five semi-autonomous divisions: Little Rock, St. Louis, San Antonio, Fort Worth, Phoenix)	1,277.3
Dollar General Corp., Scottsville, Ky.	480.5
Dress Barn, Inc., Stamford, Conn. (156 stores) (acquired six former Pants Corral locations from Giant Foods in Washington, D.C. market; acquired eight Tagg Stores in 1984 from The Gap and 48 Off The Rack stores)	103.0
Duckwall-ALCO Stores, Inc., Abilene, Ks.	363.9
The Dunlap Co., Fort Worth, Tex. (Also operates Striplings & Co., Fort Worth; bought Sakowitz's Amarillo stores)	100.0
Edison Bros. Stores, Inc., St. Louis, Mo. (apparel specialty store division sales: $272.1 million)	1,054.7
Elder Beerman Stores Corp., Dayton, Oh. (Department store division: $238.0 million--total of 24 stores with the purchase of 4 Macy's stores in Ohio)	311.9
Evans, Inc., Chicago, Ill. (Fur specialty stores and leased departments)	145.7
Family Dollar Stores, Inc., Charlotte, N.C.	340.9
Fashion Bar, Aurora, Co. (22 Womens Fashion Bar, 17 Mens Fashion Bar, 19 States (Jr. Shops), 8 Young Set (girls), 6 F B Design Stores, 4 Hannah (Better) Shops)	125.0
Federated Department Stores, Inc., Cincinnati, Oh. (Department store division sales: $6.9 billion in 382 outlets) (Specialty store operations include The Children's Place, Pine Brook, N.J., 139 stores with a volume of $135.9 million, Gold Circle, Worthington, Oh., 50 stores with a volume of $627.9 million; Richway, Atlanta, 31 stores with a volume of $432 million) Excluding Supermarket Sales:	7,961.0
Fishers Big Wheel, Inc. New Castle, Pa. (73 stores)	160.0
Frederick's of Hollywood, Hollywood, Ca.	45.3
Gap Stores, Inc., San Bruno, Ca. (Including 21 Banana Republic stores with an estimated 1985 volume of $50 million and 29 Pottery Barn stores)	534.1
Gaylords National Corp., Secaucus, N.J.	145.7
General Mills, Inc., Minneapolis, Minn. (Including Eddie Bauer, 41 stores in the U.S. and Canada with sales of $150 million; The Talbots, 59 stores with sales of $144 million; We Are Sportswear, 22 stores with sales of $30 million, to be liquidated) Specialty Retailing Group sales:	437.6
Glosser Brothers, Inc., Johnstown, Pa. (Includes Gee Bee discount stores)	280.1
W.R. Grace & Co., New York, N.Y. (Includes Herman's World of Sporting Goods, 131 stores with sales of $368.4 million) Apparel Specialty Store sales:	610.0

(Plans to sell its retail group in 1986 as part of a restructuring program).

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	SALES (Millions of $)
Hartmarx, Chicago, Ill. (Including 27 Wallachs stores with estimated volume of $40 million) Retail store sales:	612.0
Heck's, Inc., Nitro, W.Va. (Operates 125 discount department stores)	464.7
D.H. Holmes, New Orleans, La.	271.7
Howland-Steinbach, White Plains, N.Y. (Division of Supermarkets General Corp.) (29 stores)	182.5
Hutzler Bros. Co., Baltimore, Md. (Operates 11 department stores located in the Baltimore area and Maryland's Eastern Shore; purchased Sara Fredericks, a women's specialty chain, in October 1984) (Agreed to buy B. Altman & Co.'s retail operations in September 1985 from an investor group that is acquiring Altman's from the Altman Foundation).	130.0
Interco, Inc. St. Louis, Mo. (Including Idaho Dept. Stores--formerly P.N. Hirsch)	545.3
JByrons, Miami, Fla. (Division of Jack Eckerd Corp.) (Operates 57 junior department stores in Florida) (To be sold to Amcena Corp., New York City)	220.5
Jacobson Stores, Inc., Jackson, Mich.	240.7
Jamesway Corp., Secaucus, N.J.	475.4
Judy's, Van Nuys, Ca.	50.0
K mart Corp., Troy, Mich.	21,095.9
Kids "R" Us, Rochelle Park, N.J. (10 stores) (1985 plans call for the opening of 15 stores in N.Y., N.J., Pa. and Md.)	30.0
Kline Bros. Co., New York, N.Y.	80.0
Lamont's Apparel Stores, Seattle, Wash. (Division of Pay 'n Save Corp.)	136.0
The Limited Stores, Inc., Columbus, Oh. (Acquired Lerner Stores, with 1984 sales of $700 million, from Rapid-American in February 1985) (Acquired Henri Bendel, New York City, with 1984 sales of $26 million, in October 1985)	1,343.1
R.H. Macy & Co., Inc., New York, N.Y. (Proposed takeover by top management in October 1985)	4,065.1
Manhattan Industries, Inc., New York, N.Y. Specialty Store Retailing Sales:	151.2
May Department Stores, St. Louis, Mo. (Department store division sales: $3,235.7 million)	4,762.4
Melville Corp., Harrison, N.Y. (Including Marshall's, $1.2 billion in sales; Wilson's, $73.8 million; Chess King, $200.6 million; Foxmoor, $161.8 million; Linens 'n Things, $127.6 million) Apparel Specialty Store sales:	1,753.3
Mercantile Stores Co., Wilmington, Del. (78 stores)	1,706.9
Merry-Go-Round, Towson, Md.	158.1
Montgomery Ward, Chicago, Ill. (Mobil Corp.) (Sales of Jefferson Ward subsidiary: $570 million; 18 out of 44 Jefferson Ward stores sold to Bradlees, a division of Stop & Shop) (Montgomery Ward catalog operation discontinued in August 1985; its 1984 sales were $1.3 billion)	6,495.0
B.C. Moore & Sons, Wadesboro, N.C. (75 stores)	67.0
G.C. Murphy Co., McKeesport, Pa. (Acquired by Ames Department Stores, Rocky Hill, Conn., in April 1985)	913.3

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	SALES (Millions of $)
National Shirt Shops, New York, N.Y.	$ 70.0
New Process Co., Warren, Pa.	299.1
S.E. Nichols, Inc., New York, N.Y.	294.1
Nordstrom, Inc., Seattle, Wash. (Operates 44 specialty stores) (Total of 5 California stores opened in 1985: estimated first year volumes for Corte Madera (Marin Country), Westside Pavilion (Los Angeles) and Galleria (Redondo Beach) stores estimated at $40 million +; Horton Plaza (San Diego store): $25-30 million; Oakridge Mall (San Jose) store opened late October 1985)	982.7
Oshman's Sporting Goods, Inc., Houston, Tex. (Including 19 Abercrombie & Fitch specialty stores with a volume of $35 million)	304.4
Paul Harris Stores, Inc., Indianapolis, Ind.	111.2
J.C. Penney Co., Inc., New York, N.Y.	13,451.0
Petrie Stores Corp., Secaucus, N.J. (Including Winkelman's with a volume of $88.9 million and Miller-Wohl with a volume of $180.8 million)	951.1
Phillips-Van Heusen Corp., New York, N.Y. Apparel Specialty Store sales:	133.5
H.C. Prange Co., Sheboygan, Wis. (Including Prangeway Discount Store sales)	247.0
Rapid-American Corp., New York, N.Y. (Including 800 Lerner Stores with sales of $700 million--sold to The Limited in February 1985; McCrory, 723 stores with sales of $900 million)	1,816.0
Rose's Stores, Inc., Henderson, N.C.	927.4
Ross Stores, Inc., Newark, Ca. (66 off-price chain stores)	210.5
SCOA Industries, Inc., Columbus, Oh. (Includes 123 Hills Department Stores and The Dry Goods Co., Aston, Pa., seven stores) General Merchandising Division Sales:	1,201.9
Salkin & Linoff, Inc., Minneapolis, Minn. (18 apparel specialty stores under various names in Minn.)	103.0
Schottenstein's Stores Corp., Columbus, Oh. (Including Wieboldt Stores with a volume of $191.2 million--attempted acquisition by WSI Acquisition Corp. in October 1985)	355.0
Schultz Bros., Lake Zurich,Ill. (74 general merchandise and variety stores)	60.0
Sears, Roebuck & Co., Inc. Chicago, Ill. U.S. Merchandising Operations:	21,671.0
Sprouse-Reitz Co., Inc., Portland, Ore.	182.7
Spurgeon Mercantile Corp., Chicago, Ill.	65.0
Strawbridge & Clothier, Philadelphia, Pa. (Including sales of Clover Stores with sales of $250 million)	630.5
Super Valu Stores, Inc., Minneapolis, Minn. (Including 48 ShopKo stores) (County Seat sold to Carson Pirie Scott in mid-1984) Retail General Merchandising Operations:	609.6
Syms, New York, N.Y.	204.3

MAJOR NATIONAL/REGIONAL CHAINS (continued)

Retail Chain	SALES (Millions of $)
T.G.&Y. Stores, Oklahoma City, Okla. (500 family centers, 248 variety stores) (Household International, Prospect Heights, Ill., to sell its merchandising division--which includes T.G.& Y. Stores--to investment group in October 1985)	$ 2,205.4
Toys "R" Us, Rochelle Park, N.J. (35 new toy stores to open nationally in 1985)	1,701.7
TSS/Seedman's, Brooklyn, N.Y.	200.0
U.S. Shoe Corp., Cincinnati, Oh. Apparel Specialty Retailing Division:	905.9
The Vogue Shops, Jacksonville, Fla.	67.5
Wal-Mart Stores, Inc., Bentonville, Ark.	6,400.9
Weiner's, Houston, Tex.	250.0
Wickes Companies, Inc., San Diego, Ca. (Including 89 Howard's discount department stores) Apparel Specialty Store sales:	537.0
F.W. Woolworth Co., New York, N.Y. (U.S. Woolworth, $1,906 million; Richman Bros., $249 million; J. Brannam, $82 million; Holtzman's Little Folk Shops, $73 million) U.S. Operations:	3,468.0
Younkers, Des Moines, Iowa (Equitable of Iowa Companies)	188.6
Zayre Corp., Framingham, Mass. (Discount department stores: $2,195.7 million; Off-price division: T.J. Maxx, 156 units and Hit or Miss, 401 units, together had sales of $927.3 million)	3,123.0

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES
OPERATED BY CONGLOMERATE CORPORATIONS

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Allied Stores Corporation	New York, N.Y.
Ann Taylor	New York, N.Y.
Block's (William H. Block & Co.)	Indianapolis, Ind.
The Bon (Bon Marche)	Seattle, Wash.
Bonwit Teller	New York, N.Y.
Brooks Brothers	New York, N.Y.
Cain-Sloan	Nashville, Tenn.
Catherine's Stout Shoppe	Memphis, Tenn.
Deys	Syracuse, N.Y.
Donaldson's	Minneapolis, Minn.
Garfinckel's	Washington, D.C.
Heer's	Springfield, Mo.
Herp's	Muskegon, Mich.
Jordan Marsh-Florida	Miami, Fla.
Jordan Marsh-New England	Boston, Mass.
Joske's	Dallas, (includes Houston & San Antonio divisions)
Levy's	Savannah, Ga.
Maas Brothers	Tampa, Fla.
Miller & Rhoads	Richmond, Va.
Miller's	Knoxville, Tenn.
Muller's	Lake Charles, La.
Plymouth	New York, N.Y.
Pomeroy's	Harrisburg & Levittown, Pa.
Powers Dry Goods Co. (acquired from Associated Dry Goods in June 1985; to be merged with Donaldson's)	Minneapolis, Minn.
Read's	Bridgeport, Conn.
Stern's/Gertz	Paramus, N.J.
Wren's (absorbed by Block's in 1984)	Springfield, Ohio
Amfac, Inc.	Honolulu, Hawaii
Liberty House of Hawaii	Honolulu, Hawaii
Village Fashion Outlets (VFO)	Philadelphia, Pa.
Associated Dry Goods	New York, N.Y.
L.S. Ayres & Co.	Indianpolis, Ind.
Caldor, Inc.	Norwalk, Conn.
The Denver Dry Goods Co.	Denver, Co.
Goldwater's	Scottsdale, Ariz.
Hahne & Co.	Newark, N.J.
Joseph Horne Co.	Pittsburgh, Pa.
Loehmann's	New York, N.Y.
Lord & Taylor	New York, N.Y.
Powers Dry Goods Co. (sold to Allied Stores in June 1985)	Minneapolis, Minn.
J.W. Robinson Co	Los Angeles, Ca.
Robinson's of Florida	St. Petersburg, Fla.
Sibley, Lindsay & Curr Co.	Rochester, N.Y.
The Stewart Dry Goods Co. (to be merged with L.S. Ayres in January 1986)	Louisville, Ky.
Sycamore Specialty Stores	Indianpolis, Ind.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Batus Inc. (Batus Retail Group)	New York, N.Y.
The Crescent	Spokane, Wash.
Frederick & Nelson	Seattle, Wash.
Gimbels-East	New York, N.Y.
Gimbels-Midwest	Milwaukee, Wis.
Gimbels-Pittsburgh	Pittsburgh, Pa.
Ivey's-Carolinas	Charlotte, N.C.
Ivey's-Florida	Orlando, Fla.
Kohl's Department Stores	Brookfield, Wis.
Marshall Field & Co.	Chicago, Ill.
Saks Fifth Avenue	New York, N.Y.
Thimbles	New York, N.Y.
Carson Pirie Scott & Company	Chicago, Ill.
Carson Pirie Scott Department Stores	Chicago, Ill.
County Seat	Chicago, Ill.
CPS Direct Marketing	Chicago, Ill.
Carter Hawley Hale Stores, Inc.	Los Angeles, Ca.
Bergdorf Goodman Co.	New York, N.Y.
The Broadway-Southern California	Los Angeles, Ca.
The Broadway-Southwest	Phoenix, Ariz.
Contempo Casuals	Los Angeles, Ca.
Emporium Capwell	San Francisco, Ca.
Neiman-Marcus	Dallas, Tex.
Thalhimers	Richmond, Va.
John Wanamaker	Philadelphia, Pa.
Weinstock's	Sacramento, Ca.
Crown American	Johnstown, Pa.
Hess's Department Stores (acquired Rices Nachmans from Phillips-Van-Heusen Corp. in February 1985)	Allentown, Pa.
Dayton Hudson Corp.	Minneapolis, Minn.
Dayton Hudson Department Stores	Minneapolis, Minn.
Mervyn's	Hayward, Ca.
Target	Minneapolis, Minn.
Edison Brothers Stores, Inc.	St. Louis, Mo.
Fashion Conspiracy	St. Louis, Mo.
Jeans West/Oak Tree	St. Louis, Mo.
Size 5-7-9 Shops	St. Louis, Mo.
Elder Beerman Stores Corp.	Dayton, Oh.
Elder Beerman Department Stores	Dayton, Oh.
Margo's/Regan's	Dallas, Tex.
Spare Change	Dayton, Oh.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS (continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Federated Department Stores, Inc.	Cincinnati, Oh.
Abraham & Straus	Brooklyn, N.Y.
Bloomingdale's	New York, N.Y.
Boston Store (sold to P.A. Bergner in January 1985)	Milwaukee, Wis.
Bullock's	Los Angeles, Ca.
Burdine's	Miami, Fla.
The Children's Place	Pine Brook, N.J.
Filene's	Boston, Mass.
Filene's Basement	Boston, Mass.
Foley's	Houston, Tex.
Goldsmith's	Memphis, Tenn.
Lazarus	Columbus, Oh.
I. Magnin	San Francisco, Ca.
MainStreet	Bannockburn, Ill.
Rich's	Atlanta, Ga.
Sanger-Haris (acquired John A. Brown stores from Dillard in May 1985)	Dallas, Tex.
Shillito Rikes	Cincinnati, Oh.
General Mills, Inc.	Minneapolis, Minn.
Eddie Bauer	Redmond, Wash.
The Talbots, Inc.	Hingham, Mass.
W.R. Grace	New York, N.Y.
Berman's	Brooklyn Park, Minn.
Herman's World of Sporting Goods	Cartaret, N.J.
Shepler's	Wichita, Ks.
Hartmarx (formerly Hart Schaffner & Marx)	Chicago, Ill.
Baskin Clothing Co.	Chicago, Ill.
Ray Beers	Topeka, Ks.
Blackburn's	Amarillo, Tex.
Capper & Capper, Inc.	Detroit, Mich. and Chicago, Ill.
Country Miss Stores	New York, N.Y.
deJong's	Evansville, Ind.
Field Brothers	New York, N.Y.
Arthur Frank	Salt Lake City, Utah
Frank Brothers	San Antonio, Tex.
Hanny's	Phoenix, Ariz.
Hasting's	San Francisco, Ca.
Jack Henry	Kansas City, Mo.
Heyward mahon	Greenville, S.C.
J.O. Jones	Charlotte, N.C.
Kleinhans	Buffalo, N.Y.
Klopfenstein's	Seattle, Wash.
Kuppenheimer's	Atlanta, Ga.
Leopold Price & Rolle	Houston, Tex.
Levy-Wolf	Jacksonville, Fla.
Liemandt	Minneapolis, Minn.

(Hartmarx continued on next page)

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Hartmarx (continued)	
Littler's	Seattle, Wash.
Merritt Schaefer & Brown	Austin, Tex.
National Clothing	St. Louis, Mo.
Polo Shop	Seattle, Wash.
Porter-Stevens	New Orleans, La.
Root's	Red Bank, N.J.
Shulman's	Hampton, Va.
Silverwoods	Los Angeles, Ca. and Las Vegas, Nev.
Stevens	Jackson, Miss.
Chas. A. Stevens	Chicago, Ill.
F.R. Tripler & Co.	New York, N.Y.
Walkers	Columbus and Dayton, Oh.
Wallachs	New York, N.Y.
Wallachs of Florida	Miami, Fla.
Jas. K. Wilson	Dallas, Tex.
Wolf Bros.	Tampa, Fla.
Zachry	Atlanta, Ga.
Interco, Inc.	St. Louis, Mo.
Fine's Men's Shops, Inc.	Norfolk, Va.
Golde's Department Stores	St. Louis, Mo.
Idaho Department Stores Co.	Caldwell, Id.
United Shirt Distributors, Inc.	Detroit, Mich.
Jack Eckerd Corp.	Clearwater, Fla.
JByrons Department Stores (To be sold to Amcena Corp.)	Miami, Fla.
Eckerd's Apparel, Inc.	Charolotte, N.C.
The Limited, Inc.	Columbus, Oh.
Henri Bendel (acquired in October 1985)	New York, N.Y.
Lane Bryant	New York, N.Y.
Lerner Stores Corp. (acquired from Rapid-American)	New York, N.Y.
The Limited	Columbus, Oh.
The Limited Express	Columbus, Oh.
Sizes Unlimited/Smart Size	New York, N.Y.
Victoria's Secret	Columbus, Oh.
R.H. Macy & Co., Inc.	New York, N.Y.
Bamberger's	Newark, N.J.
Macy's Atlanta (consolidation of Davison's & Macy's Midwest)	Atlanta, Ga.
Macy's California	San Francisco, Ca.
Macy's New York	New York, N.Y.
Manhattan Industries	New York, N.Y.
Frost Brothers	San Antonio, Tex.
Manhattan Factory Outlet	Fairlawn, N.J.
Manhattan Ward, Inc.	Conshohocken, Pa.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
The May Department Stores Co.	St. Louis, Mo.
Famous-Barr Co.	St. Louis, Mo.
G. Fox & Co.	Hartford, Conn.
The Hecht Co.	Washington, D.C. and Baltimore, Md.
Kaufmann's	Pittsburgh, Pa.
May-Cohens	Jacksonville, Fla.
The May Co.	Cleveland, Oh.
May Co., California	Los Angeles and San Diego, Ca.
May-D & F	Denver, Co.
Meier & Frank Co.	Portland, Ore.
The M. O'Neil Co.	Akron, Oh.
Stouss	Youngstown, Oh.
Melville Corp.	Harrison, N.Y.
Chess King	Worcester, Mass.
Foxmoor	West Bridgewater, Mass.
Linens 'n Things	Roseland, N.J.
Marshall, Inc.	Woburn, Mass.
Wilson's	Los Angeles, Ca.
Mercantile Stores Co., Inc.	Wilmington, Del.
Bacon's	Louisville, Ky.
Castner Knott Co.	Nashville, Tenn.
de Landrecies	Fargo, N.D.
Gayfer's/Montgomery Fair	Montgomery, Ala.
C.J. Gayfer & Co.	Mobile, Ala.
Glass Block	Duluth, Minn.
Hennessey's	Billings, Mont.
The Jones Store Co.	Kansas City, Mo.
Joslin's	Denver, Co.
Lion	Toledo, Oh.
McAlpin's	Cincinnati, Oh. & Lexington, Ky.
Root's	Terre Haute, Ind.
J.B. White	Augusta, Ga. & Columbia, S.C.
Petrie Stores Corp.	Secaucus, N.J.
David's	Secaucus, N.J.
Franklin's	Secaucus, N.J.
G & G Shops	New York, N.Y.
Hartfield's	Secaucus, N.J.
Marianne	Secaucus, N.J.
Miller-Wohl	Secaucus, N.J.
Petrie's	Secaucus, N.J.
Stuart's	Secaucus, N.J.
Whitney	Secaucus, N.J.
Winkelman's	Detroit, Mich.

TRADITIONAL DEPARTMENT STORES AND APPAREL STORES OPERATED BY CONGLOMERATE CORPORATIONS
(continued)

Corporations & Retail Divisions	Location of Headquarter Office or Headquarter Store
Phillips-Van Heusen Corp.	New York, N.Y.
Hamburger's	Baltimore, Md.
Harris & Frank	Los Angeles, Ca.
Juster's	Minneapolis, Minn.
Kennedy's	Boston, Ma.
Rices Nachmans (sold to Hess's Dept. Stores in February 1985)	Norfolk, Va.
Rapid-American Corp.	New York, N.Y.
Lerner Stores Corp. (sold to The Limited in February 1985)	New York, N.Y.
McCrory Stores Corp.	New York, N.Y.
U.S. Shoe Corp.	Cincinnati, Oh.
Ups 'n Downs	Enfield, Conn.
August Max	New York, N.Y.
Career Images	Enfield, Conn.
Caren Charles	Enfield, Conn.
Casual Corner	Enfield, Conn.
T.H. Mandy	Merrfield, Va.
The Proving Ground	Enfield, Conn.
J. Riggings	Atlanta, Ga.
Petite Sophisticate	Enfield, Conn.
F.W. Woolworth Co.	New York, N.Y.
Anderson-Little	Fall River, Mass.
J. Brannam	New York, N.Y.
Holtzman's Little Folks Shops	City of Industry, Ca.
Richman Brothers	Cleveland, Oh.
Susie's Casuals	New York, N.Y.
Woolworth's	New York, N.Y.

FAIRCHILD FACT FILES CURRENTLY AVAILABLE

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now--1985 Edition will be available in February, 1986)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. (1984 Edition available now--1985 Edition will be available in August, 1985).

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (Includes a new consumer buying intention survey) (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: (Including Tailored Casual Wear) Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (November)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and physical fitness.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons are made with findings in the last previous census, covering operations in 1977. (December)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (August)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change.
For orders and further information, please write to:

FAIRCHILD FACT FILES, Fairchild Books, 7 East 12th Street, New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.82-4

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

Consumer Market Developments

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst
Kenneth Greenman, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add up to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1985 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-530-5

Printed in the United States of America

CONSUMER MARKET DEVELOPMENTS

Table of Contents

CURRENT TRENDS........ 1
POPULATION TRENDS........ 2
  BIRTHS........ 3
    AGE OF MOTHER........ 3
    OUTLOOK........ 4
    OVERALL PATTERN........ 5
    REGIONAL VARIATIONS........ 8
    SEX, RACE........ 8
    AGE OF FATHER........ 9
  TOTAL POPULATION........ 9
    AGE/SEX STRUCTURE........ 10
    RACE/COLOR........13
    PROJECTIONS........16
    POPULATION BY REGIONS & STATES........19
    METROPOLITAN-NONMETROPOLITAN MARKETS........22
    MOBILITY/MIGRATION PATTERNS........25
  MARRIAGES & MARITAL STATUS........27
    MARRIAGES........27
    DIVORCES........28
    MARITAL STATUS........29
  HOUSEHOLDS & FAMILIES........29
  LIVING ARRANGEMENTS........31
    CHILDREN UNDER 18 YEARS OF AGE........31
    YOUNG ADULTS........33
    THE ELDERLY........34
  SCHOOL ENROLLMENT........36
  EDUCATIONAL ATTAINMENT........36
  LABOR FORCE, EMPLOYMENT & EARNINGS........36
    LABOR FORCE PROFILE........36
    EMPLOYMENT STATUS........39
    EARNINGS........45
  INCOME........47
    PERSONAL INCOME PROFILE........47
    SAVINGS........48
    MONEY INCOME OF INDIVIDUALS........48
    HOUSEHOLD/FAMILY INCOME........52
    DISCRETIONARY INCOME........54
    STATE & REGION........55
    METROPOLITAN AREAS........56
  CONSUMER FINANCES........56
    HOUSING STATUS........57
  CONSUMER EXPENDITURES........58
    SPENDING PATTERNS BY HOUSEHOLD CHARACTERISTICS........60
    PERSONAL CONSUMPTION EXPENDITURES FOR APPAREL & HOMEFURNISHINGS......62
  CONSUMER PRICES........63

SCHEDULE OF ADDITIONAL FACT FILES........64

CONSUMER MARKET DEVELOPMENTS

Current Trends

Prospects of lower crude oil prices, helping to reduce interest rates and the rate of inflation, and a surging stock market have bolstered the outlook for the consumer market at the onset of 1986. Economists' forecast are being revised upward, as the indicators point to an accelerating economy, sparked in particular by lower interest rates, at least for the first half of the year.

Housing and related industries will benefit from the improved economy as mortgage rates decline. Homeowners are trading up to bigger and better houses, and some gains in new households should result as affordable housing becomes available for new owners. This will help marketers of homefurnishings and equipment of all kinds. Moreover, retailing in general is expected to benefit as consumers have more buying power and feel wealthier as a result of a sharp rise in the stock market.

In general strength continues to be centered on the upscale market, favored now both by demographic and economic conditions and life styles. The older segments of the baby boom generation offer a large target market of people entering their peak earning and home-establishing years. The number of households with two or more earners continues to grow, resulting in discretionary income, available for spending beyond necessities. There is also a growing mature market, with above average disposable incomes.

Not all segments of the Nation's consumers, and not all areas, are benefiting from current trends, however. Income is highly concentrated among the top 20% of households. Many consumers have taken on a heavy debt load and may tend to concentrate on repayments and building up depleted savings in 1986. Unemployment rates have been rising in some areas of the country, and the nationwide average is still high--averaging 7.1% for 1985 compared with 7.4% in for 1984, 7.0% for 1980, and 5.5% in 1975.

Durable goods have been doing better in sales than nondurables, incuding apparel. This trend is expected to continue in 1986, although new-car sales are expected to decline, particularly U.S. makes, reversing the strong gains made in 1985.

Retail Sales By Major Type of Business, 1985

	Millions of $	% Change 1985/84
Retail trade, total	$1,377,862	+ 6.2
Durable goods, total	511,321	+ 10.1
Selected types:		
Building materials, hardware, garden supply, etc.	72,947	+ 6.2
Automotive dealers	310,001	+ 11.9
Furniture, homefurnishings, equipment	70,596	+ 11.0
Furniture stores	23,358	+ 3.9
Appliance stores	8,807	+ 11.5
Jewelry stores	11,161	+ 8.7
Nondurable goods, total	866,541	+ 4.1
Selected types:		
General merchandise store group	160,558	+ 4.5
Department stores	135,081	+ 4.5
Food stores	281,430	+ 4.2
Gasoline service stations	102,731	+ 1.7
Apparel & accessory stores	71,898	+ 7.5
Men's & boys' clothing, furnishings stores	8,472	+ 0.5
Women's wear stores	30,048	+ 0.7
Family clothing stores	19,597	+ 11.6
Shoe stores	10,884	+ 5.3
Eating & drinking places	130,333	+ 5.0
Drug & Proprietary stores	47,371	+ 7.3
Liquor stores	19,391	- 0.5
Nonstore retailers	26,874	+ 10.9
Mail order (department store mdse.)	4,397	- 7.4

Source: U.S. Bureau of the Census, Monthly Retail Trade Current Business Reports.

POPULATION TRENDS

Births

Changes in the U.S. population counts are primarily a function of changes in fertility rates and in the number of women who are of child-bearing age. Mortality rates and net immigration affect the total to a lesser degree.

Birth totals declined in the 1960's and up to 1976, but have registered modest gains each year since 1976. A preliminary estimate on the number in 1985 by the Census Bureau places the total at 3.8 million, with a small increase anticipated for 1986.

In the first 11 months of 1985, the National Center for Health Statistics reported that live births in the Nation were slightly higher (1.8%) than the total in the same 1984 period. The birth rate (live births per 1,000 population) in January-November 1985 was 15.8, up from 15.7 in the same period in 1984. The fertility rate (live births per 1,000 women age 15 to 44 years) registered 66.5 in the first 11 months last year compared with 66.1 in the same 1984 period.

For the year 1985, provisional estimates issued by the National Center show live births in the U.S. at 3,749,000, which is 1.4% above the 3,697,000 total reported for the year 1984. This compares with an annual total of over 4,200,000 in each of the peak baby-boom years 1957-1961.

In 1985, the birth rate averaged 15.7 per 1,000 population, according to provisional estimates, compared with 15.5 in 1983, 15.9 in 1982. In 1960, the rate was 23.7 per 1,000 population, with lows of 14.6 registered both in 1975 and 1976.

Registered Live Births in the U.S., Birth Rates & Fertility Rates, 1979-1984

	Number (thous.)				Birth Rate*				Fertility Rate**			
Year	All Races	White	All Other Total#	All Other Black	All Races	White	All Other Total#	All Other Black	All Races	White	All Other Total#	All Other Black
1985(p)	3,749.0	na	na	na	15.7	na	na	na	66.1	na	na	na
1984(p)	3,697.0	na	na	na	15.7	na	na	na	66.0	na	na	na
1983	3,638.9	2,904.2	734.7	586.0	15.5	14.6	21.3	20.9	65.8	62.4	83.2	81.7
1982	3,680.5	2,942.0	738.5	592.6	15.9	14.9	21.9	21.4	67.3	63.9	85.5	84.1
1981	3,629.2	2,908.7	720.6	587.8	15.8	14.8	22.0	21.6	67.4	63.9	86.4	85.4
1980	3,612.3	2,898.7	713.5	589.6	15.9	14.9	22.5	22.1	68.4	64.7	88.6	88.1
1979	3,494.4	2,808.4	686.0	577.9	15.6	14.5	22.2	22.0	67.2	63.4	88.5	88.3

na Not available in this series. See table on pattern in births, based on Census Bureau data, page 5.
(p) Provisional (estimated).
* Live births per 1,000 population.
** Live births per 1,000 women 15-44 years of age.
# Includes races not separately reported, as well as Black.

Source: U.S. Department of Health & Human Services, National Center for Health Statistics, Advance Report of Final Natality Statistics (Vol. 33, No. 6 Supplement, Sept. 1985); preliminary 1985 report.

The U.S. Census Bureau's figures on total births in the U.S. differ somewhat from above. Reported for 1984: 3,690,000; 1983: 3,618,000; (Current Population Reports-Series P-25, No. 971).

POPULATION TRENDS

Births

Age of Mother:

The 1984 and 1985 fertility rate of 66.0 live births per 1,000 women age 15-44 years compares with a rate of 65.8 in 1983, 68.4 in 1980, 87.9 in 1970, 118.0 in 1960. There has been a downward trend in fertility rates since 1957, with very minor upward "blips" in 1970 and in 1980, and possibly in the last two years, depending on final figures. The U.S. Census Bureau, which measures births among women in the population from age 18 to 44 years rather than the 15-to-44 year span used by the Center for Health Statistics in calculating birth rates and fertility rates, has reported that their 1984/1985 fertility rate was the lowest so far this decade.

The pattern has varied by age of women, however. Notable has been the rise in the fertility rate among women age 30 to 34 years, which went up from 56.4 per 1,000 women age 18 to 44 years in 1976 to 73.5 in 1982, sagging a bit--to 72.2--in 1984. But the Census Bureau points out that this shift in the timing of childbearing among women in this age group does not indicate another "baby boom". A 1983 report showed women age 30 to 34 years expect to average only 2.1 births by the end of their childbearing years. In comparison, women 40 to 44 years of age as of June 1984, who have completed their childbearing, will average about a 2.6 births in total. There is now evidence of a sharp decline in 1984 in fertility rates among women over 39 years.

Birth Rates By Age of Women 18 to 44 Years Old In 12-Month Periods
Ending June 1984, 1982, 1980, 1976
(Births per 1,000 women in each age group)

Age	1984	1982	1980	1976
19 - 44 years	65.8	70.5	71.1	67.2
18 - 24 years	86.9	88.3	96.6	93.2
25 - 29 years	105.5	110.7	114.8	104.8
30 - 34 years	72.2	73.5	60.0	56.4
35 - 39 years	22.7	29.4	26.9	22.6
40 - 44 years	5.5	10.5	9.9	6.5

Source: U.S. Bureau of the Census,
Current Population Reports Series P-20 No. 401
Fertility of American Women: June 1984

According to the National Center for Health Statistics, women in 1983 under the age of 18 years accounted for 5.0% of total births; 40.6% of the total was accounted for by women in the 18-24 age group. Women 35 and older accounted for 5.7% of the total, up from 4.6% in 1980.

POPULATION TRENDS

Births

Percent of Live Births By Age of Mother, 15-44 Years of Age, 1980, 1983

	1983		1982	
	No. (thous.)	Percent	No. (thous.)	Percent
Total	3,638.9	100.0	3,612.3	100.0
Age of mother:				
Under 18 years	182.4	5.0	208.4	5.8
18 - 24 years	1,476.9	40.6	1,580.1	43.7
25 - 29 years	1,147.7	31.5	1,108.3	30.7
30 - 34 years	624.5	17.2	550.4	15.2
35 & older	207.4	5.7	165.1	4.6

Source: National Center For Health Statistics,
Advance Report of Final Natality Statistics

Outlook:

The annual total fertility rate--calculated as the number of children each woman in the 15-to-44 age group would have if during her entire 30-year child-bearing span she bore children at the same rate as all women aged 15-44 in a particular year--was 3.6 births per woman among white families in 1957. The rate dropped sharply by 1975 to just 1.7 births per woman, and the rate has been holding at about that level. This is substantially below the total fertility rate of 2.1 required for the natural replacement of the population.

Long-range studies put the baby-boom years (from about 1946 to 1964) in perspective. The pattern in marriages and childbearing shifted radically during the post-World War II period, and differed markedly both from the trends that preceded it and that followed it. Fertility in the U.S. had been decreasing steadily since 1800 (when the rate was 7 children per woman). Some demographers hold to the opinion that the trends in the 1980's represent a return to the earlier period of declining birth rates which had been interrupted by abnormal conditions leading to the baby boom. Which way, and how quickly, the birthrate will travel next, however, is impossible to predict exactly. Delayed childbearing, current changes in birth control technology and in attitudes and values will all play a role in this development.

The outlook is definitely not for a great increase in births at the present time. It should be noted that in 1984, 66% of women aged 20-24 and about 40% of women aged 25-29 were still childless, compared with only 50% and 19%, respectively, of women in those same age groups during the 1950's.

The total number of births in the immediate years ahead will depend to a large extent on past population growth and the number of women of childbearing age. The population will continue to grow by natural increase until well into the 21st Century, even if the fertility rates continue at their present low levels because of the large number of women born during the baby boom period, who are now of childbearing age. After the boomers, comes the baby-bust crop born after 1972. From 1972 to 1982 only 33 million children were born--a sharp drop from the 42 million in 1955-1965.

POPULATION TRENDS

Births

Outlook:

Based on a series of three projections of the U.S. population to the year 2080 by age groups, in the middle series the U.S. Census Bureau assumed that the number of births would remain above the 3,731,200 reported for 1982 (somewhat higher than the later figure compiled by the National Center for Health Statistics totaling 3,680,500 in 1982), through the early 1990's. A peak of 3.9 million was expected in the late 1980's. After the early 1990's, the Census Bureau reported, birth totals would never again be more than 3.7 million because of a decline in the female childbearing population. The number of births was expected to fluctuate between 3.4 million and 3.7 million.

Adjusting the Census Bureau's middle series projections on births to reflect current counts, an increase in births through 1988 is expected, followed by a slow decline. According to American Demographics, in 1995, 200,000 fewer births than reported for 1985 can be expected. Only sharp gains in fertility rates would change this general outlook.

Overall Pattern:

The general pattern in births in the U.S. among women age 18 to 44 years in the 12 months ending June 1984 is outlined in the following table. Significantly higher fertility rates are reported among Hispanic women than among women not of Spanish origin. The former accounted for 9% of all births in the period measured. The fertility rate for Black women (72.2) was higher than for White women (64.6), but only for those age 18-to-24 years (Blacks: 108.2; Whites: 84.0).

Women 18 to 44 years old in the Northeast had the lowest fertility rate (56.9), the highest percent childless (42%) among women in the four major regions of the U.S. in 1984. Historically, women in the Northeast delay their childbearing more than women in the rest of the Nation: 79% of the women 18 to 24 years old living in the Northeast were childless as of June 1984 compared with 72% of women in the Midwest or West, and 66% of women 18 to 24 in the South.

Pattern In Births in the U.S. - 12 Months Ending June 1984
Among Women Age 18 to 44 Years

	Total No. of Women Age 18-44 Years (thousands)	Births Per 1,000 Women in 12-Month Period		Approx. Total Number of Births*	
		Total Births	First Births	Thous.	Percent
Total, all women	50,304	65.8	27.7	3,310	100.0
Age:					
18-29 years	25,052	94.8	45.2	2,374	71.7
30-44 years	25,252	37.1	10.2	936	28.3
Race:					
White	42,230	64.6	28.6	2,728	82.4
Black	6,442	72.2	22.2	465	14.0
Spanish origin:					
Spanish origin**	3,327	86.1	29.2	285	8.6
Not of Spanish origin	46,977	64.4	27.5	3,025	91.4

(continued)

Births

Overall Pattern:

Pattern In Births in the U.S. - 12 Months Ending June 1984 Among Women Age 18 to 44 Years
(continued)

	Total No. of Women Age 18-44 Years (thousands)	Births Per 1,000 Women in 12-Month Period		Approx. Total Number of Births*	
		Total Births	First Births	Thous.	Percent
Marital status:					
Married, husband present	28,894	91.7	37.6	2,650	80.1
Married, husband absent	2,174	46.8	15.2	102	3.1
Widowed, divorced	4,944	20.6	5.1	102	3.1
Single	14,291	32.0	17.2	456	13.7
Labor force status:					
In labor force:					
Employed	32,365	42.6	22.0	1,379	41.7
Unemployed	2,948	57.2	23.5	169	5.1
Not in labor force	14,990	117.6	40.7	1,762	53.2
Occupation of employed women:					
Managerial-professional	7,255	45.1	23.6	327	9.9
Technical, sales, & admin. support	15,165	39.9	22.2	605	18.3
Service workers	5,818	43.4	21.0	253	7.6
Precision prod., craft, etc.	831	43.3	26.2	36	1.1
Operators, fabricators, etc.	2,864	46.6	18.9	133	4.0
Farming, forestry, etc.	432	55.7	14.7	24	0.7
Family income:					
Under $10,000	9,210	88.5	33.8	815	24.6
$10,000 to $14,999	6,408	70.8	27.3	453	13.7
$15,000 to $19,999	6,097	69.7	31.6	425	12.8
$20,000 to $24,999	5,314	67.6	27.3	359	10.8
$25,000 to $29,999	4,806	58.8	24.2	282	8.5
$30,000 to $34,999	4,392	64.8	24.8	284	8.6
$35,000 & over	12,043	46.0	22.7	554	16.7
Income not reported	2,035	67.7	23.4	138	4.2
Region of residence:					
Northeast	10,644	56.9	25.9	605	18.3
Midwest	12,462	68.0	27.5	847	25.6
South	17,033	66.4	28.2	1,130	34.1
West	10,165	71.6	28.7	728	22.0

* Number of births are understated as figures are for women who had a birth in the 12-month period and omit multiple births as well as more than one birth in the period. (Births among women under 18 are also not included).

** Persons of Spanish origin may be of any race.

Source: U.S. Bureau of the Census: Current Populations Reports
Series P-20, No. 401 June 1984. Fertility of American Women

Births

Overall Pattern: (continued)

Studies indicate that the initial home environment differs substantially for children born to women under 30 years of age compared with children born to older women. The latter group includes a higher percentage of women who are college-educated, who are in a professional or managerial occupation and who have above-average household incomes.

Of the women age 18 to 44 years who gave birth in the 12-month period ending June 1984 (3,100,000), 72% were age 18 to 29, 28% were 30 years of age and older. College graduates represented 34% of new mothers age 30 and older, 12% of those aged 18 to 29. Forty-eight percent of older new mothers were employed vs. 39% of the younger group. Managerial or professional positions were held by 17% of the older group, 7% of the younger new mothers; 30% of the former group had household incomes over $35,000 a year compared with 11% of the younger group.

Birth Order:

In general, marketers focusing on the new-mother/baby markets can find encouragement in the overall figures on birth order. Four out of 10 births represent first births and the requirements for apparel and equipment for these children are higher than for later children, as a rule. It is estimated that parents spend only 69% as much on a second child as they do on a first child. In 1984, 12% of the first-borns had mothers who were 30 years of age or older (the most affluent group), compared with 8% in 1979, 4% in 1971.

Birth Orders As A Percent of Total Births, 1972-1983

	1983	1982	1979	1972
Total births	100.0%	100.0%	100.0%	100.0%
Birth order:				
First	42.1	42.3	42.3	39.6
Second	32.6	32.4	32.0	28.5
Third	15.2	15.1	15.0	14.1
Fourth & higher	9.6	9.7	10.7	15.0
Not stated	0.5	0.5	--	2.8

Source: U.S. Dept. of Health & Human Services,
National Center For Health Statistics.

Regional Variations:

Census Bureau data shown in the table on Patterns in Births (page 5) shows a lag in the Northeast. Data compiled by the National Center For Health Statistics shows a considerable variation in fertility rates by geographic region, ranging from a low of 55.9 per 1,000 women age 15-44 years in New England to a high of 79.5 per woman of this age in the Mountain States in the 12-month period ending June 1983.

Births

Regional Variations: (continued)

Live Births by Race of Child, Birth Rates & Fertility Rates
U.S. & Nine Geographic Divisions, 1983

	Number (thousands)				
	Total (all races)	White	Black	Birth Rate*	Fertility Rate*
United States	3,639	2,904	586	15.5	65.8
New England	168	153	11	13.5	55.9
Middle Atlantic	506	400	94	13.7	58.3
East North Central	624	518	96	15.0	63.6
West North Central	276	248	19	15.8	69.2
South Atlantic	563	391	162	14.5	61.2
East South Central	223	161	60	15.0	64.0
West South Central	470	371	85	18.2	76.8
Mountain	233	208	8	18.9	79.5
Pacific	576	455	50	17.1	70.9

* Based on women age 15-44 years in each region.

Source: U.S. Dept. of Health & Human Services,
National Center For Health Statistics.

Sex & Race:

The sex ratio at birth in 1983 was 1,052 male births per 1,000 female births, compared with 1,050 for 1982. There has been very little annual variation in the ratio, with a range of 1,050 to 1,055 since 1968.

The ratio of white births was 1,057, higher than the 1982 ratio of 1,054, but well within the range of 1,053 to 1,059 observed since the mid-1960's. The sex ratio for black births was 1,028, below the 1982 ratio of 1,033, but within the range of 1,024 to 1,033 measured since 1970.

Monthly Pattern:

A consistent pattern in the monthly occurrence of births has been observed for many years. The peak months are July, August and September. There is also a distinctive pattern in the occurrence of births by day of the week. Deliveries are concentrated on Mondays through Fridays, with the peak number occurring on Tuesdays, and corresponding deficits are observed for weekends and for holidays.

POPULATION TRENDS

Births

Monthly Pattern: (continued)

Percent Distribution of Registered Live Births
By Months, 1982, 1983, 1984

	1984(p)	1983(r)	1982
Total births	100.0%	100.0%	100.0%
January	8.5	8.2	8.1
February	7.8	7.6	7.5
March	7.9	8.5	8.3
April	8.2	8.1	7.9
May	8.0	8.3	8.3
June	8.0	8.4	8.4
July	9.1	8.7	8.9
August	8.7	8.9	8.9
September	8.9	8.6	8.9
October	8.5	8.4	8.5
November	7.9	8.0	8.0
December	8.4	8.2	8.2

(p) preliminary
(r) revised

Source: U.S. Department of Health & Human Services,
National Center For Health Statistics.

Age of Father:

The birth rate for men in 1983 was 55.3 live births per 1,000 men aged 15-54 years, 2% below the 1982 rate of 56.4. The rate for white men was 51.5; for black men, 78.0. The only age group to show an increase in the birth rate was 36-39 years group (up 2%), consistent with the increases in rates noted only for women age 30-34 and 35-39 in 1983.

Total Population:

At the start of 1986, an estimated 239.4 million people--12.9 million more than were counted in the April 1980 census--were living in the United States. This was almost 2.1 million higher than the year 1985 New Year's Day figure. The record for net population growth in a single year is 3.1 million, recorded during the baby-boom year of 1957, when the U.S. population count totaled about 168 million.

The U.S. resident population increased 0.9% in 1984 and 1.0% in 1982 and in 1981 compared with the previous year. In contrast, the annual rate of increase during the peak years of the baby boom (1946-1961) ranged from 1.6% to 1.9%.

Including the Armed Forces overseas, the total population as of July 1, 1985 was 28.8 million, an increase of 11.1 million (3.9%) over the total on July 1, 1980 and 2.1 million (0.9%) over the total on July 1, 1984.

POPULATION TRENDS

Total Population

Estimates on the Population by Type, July 1, Selected Years 1970-1985
(In thousands)

As of July 1:	Total Population Including Armed Forces Overseas	Resident Population	Civilian Population
1985	238,816	238,291	236,569
1984	236,681	236,158	234,443
1983	234,538	234,023	232,327
1982	232,345	231,822	230,152
1980	227,738	227,236	225,632
1970	205,052	203,984	201,895

Source: U.S. Bureau of the Census, *Current Population Reports*, Series P-25, No. 978

Age/Sex Structure:

Detailed information on the composition of the population is available from the Census Bureau through the year 1984. Including the Armed Forces overseas, the total population reached 236,681,000, as of July 1, 1984, which was 4.2% above the complete Census count as of April 1, 1980.

As a result of the large number of women born in the baby boom years (1946-1964), who have now reached childbearing ages, there has been an increase in recent years in the number of children under 5 years of age. The total rose 9.0% between 1980 and 1984, from 16.3 million to 17.8 million. This is the largest `under-5' population since the 17.9 million recorded in 1968.

In the West, the number of children under 5 rose 18% between 1980 and 1984; in the South the increase was 11%, in the Northeast, 5%; Midwest, 2%.

The elementary school-age population (5 to 13 years of age) declined by 3.2%, from 31.2 million in 1980 to 30.2 million in 1984. The 14-to-17-year-old population declined by 9.5% during the period, much faster than any other age group. In 1980 there were 16.2 million children aged 14 to 17 years. This number peaked in 1975 at 17.1 million, but by 1984 there were only 14.7 million in this high-school age group.

Regional trends varied. The population aged 5-17 declined only 3% in the South and held close in the West, compared with the 5% decline noted nationally from 1980 to 1984.

There were fewer young adults (18 to 24 years of age) on July 1, 1984 than on April 1, 1980 (counting Armed Forces overseas). This population dropped by 3.0%, from 30.3 million to 29.4 million, and will continue to decline in a reversal of their fast growth in the 1960's and 1970's.

Age/Sex Structure: (continued)

The population 25 to 44 years of age grew significantly between 1980 and 1984: the 25-to-34 year age group grew by 10.3%, from 37.3 million to 41.1 million, while those aged 35-to-44 registered a strong 19.5% increase, rising from 25.7 million in 1980 to 30.7 million in 1984. This was the fastest growth rate noted for any age group. (The 85-and-over group, however, grew almost as fast.) Both the 25-34 and 35-44 year age groups will continue to grow for some time--particularly the latter which will get the impact of peak post-World War II births.

The 45-to-54 year age group declined by 370,000, or 1.6%, between 1980 and 1984. The number of 55-to-64-year-olds grew by 2.8%, from 21.7 million in 1980 to 22.3 million in 1984. This group will stabilize in the next few years, then start to decline as depression-year babies move into this bracket.

A striking development in recent years has been the growth of the mature market. Persons age 65 years and older have registered sharp gains--the 65-to-74 year group increased 7.5% from 15.6 million in 1980 to 16.7 million in 1984; the 75-84 age group gained 11.5%; the population 85 years and older rose 19.4%.

The continued aging of the American population is clear in the trends by median age. Including Armed Forces overseas, the median age as of 1974 was 28.5. Ten years later, it reached 31.2, and will continue to rise in coming years. The median age for the White population in 1984 was 32.2 years; for Blacks, 26.3 years. For the male population, the median age registered 30.0 years; for females, 32.5 years, reflecting the greater longevity of females relative to males.

Sex Ratios:

For younger ages (through the 18-to-24 age groups), males outnumber females in the population, reflecting a greater number of male births than female births. After that, females outnumber males to an increasing extent based on age. In 1984, by age 65 and over, there were 67.5 males per 100 females in the population of this age.

By 2050, according to a recent study conducted by the Metropolitan Life Insurance Co., the gap in the sex ratio is expected to narrow. By the year 2050, according to this study, there will be only 200,000 more women than men in the 25-to-64 age group compared with a gap of almost 2.6 million (58.6 million women vs. 57.0 million men) as of 1984.

POPULATION TRENDS

Total Population

Age/Sex Structure: (continued)

(Preceding figures have discussed the total U.S. population, including Armed Forces overseas. Following is the profile by age of the U.S. resident population as of July 1, 1980 and 1984).

Distribution of the Resident Population By Age & By Sex, July 1, 1980, 1984

(thousands)

	Number (000)		% Distribution		% Change
	1984	1980(r)	1984	1980	1984/1980
Total all ages	236,158	227,236	100.0	100.0	+ 3.9
Under 5 years	17,816	16,454	7.5	7.2	+ 8.3
5 to 9 years	16,351	16,601	6.9	7.3	- 1.5
10 to 14 years	17,567	18,241	7.4	8.0	- 3.7
15 to 24 years	40,079	42,476	17.0	18.7	- 5.6
25 to 34 years	40,911	37,436	17.3	16.5	+ 9.3
35 to 44 years	30,648	25,815	13.0	11.4	- 1.4
45 to 54 years	22,430	22,742	9.5	10.0	- 1.4
55 to 64 years	22,316	21,761	9.4	9.6	+ 2.5
65 to 74 years	16,746	15,655	7.1	6.9	+ 7.0
75 & over	11,294	10,054	4.8	4.4	+ 12.3
Median age (years)	31.3	30.0	--	--	--
Male population, total	114,765	110,414	100.0	100.0	+ 3.9
Under 5 years	9,115	8,416	7.9	7.6	+ 8.3
5 to 9 years	8,367	8,490	7.3	7.7	- 1.4
10 to 14 years	8,994	9,316	7.8	8.4	- 3.5
15 to 24 years	20,235	21,423	17.6	19.4	- 5.5
25 to 34 years	20,330	18,571	17.7	16.8	+ 9.5
35 to 44 years	15,062	12,664	13.1	11.5	+ 18.9
45 to 54 years	10,889	10,987	9.5	10.0	- 0.9
55 to 64 years	10,474	10,180	9.1	9.2	+ 2.9
65 to 74 years	7,318	6,792	6.4	6.2	+ 7.7
75 & over	3,981	3,477	3.5	3.1	+ 14.5
Median age (years)	30.0	28.9	--	--	--
Female population, total	121,393	116,822	100.0	100.0	+ 3.9
Under 5 years	8,702	8,038	7.2	6.9	+ 8.3
5 to 9 years	7,984	8,110	6.6	6.9	- 1.6
10 to 14 years	8,573	8,925	7.1	7.6	- 3.9
15 to 24 years	19,842	21,054	16.3	18.0	- 5.8
25 to 34 years	20,581	18,866	17.0	16.1	+ 9.1
35 to 44 years	15,587	13,152	12.8	11.3	+ 18.5
45 to 54 years	11,541	11,754	9.5	10.1	- 1.8
55 to 64 years	11,842	11,852	9.7	9.9	- 0.1
65 to 74 years	9,429	8,863	7.8	10.0	+ 6.4
75 & over	7,313	6,477	6.0	5.6	+ 12.9
Median age (years)	32.5	31.3	--	--	--

(r) revised

(continued)

POPULATION TRENDS

Total Population

Age/Sex Structure: (continued)

Distribution of the Resident Population (continued)

Sub-Totals By Age, 1984

	Number (thousands)			Percent of Total Population		
Age Groups	Total	Males	Females	Total	Males	Females
14 years & over	188,699	90,683	98,017	79.7%	78.7%	80.7%
16 years & over	181,263	86,877	94,386	76.6	75.4	77.7
18 years & over	173,992	83,157	90,835	73.5	72.2	74.8
21 years & over	161,864	77,002	84,862	68.4	66.8	69.9
62 years & over	34,399	14,257	20,142	14.5	12.4	16.6
65 years & over	28,040	11,299	16,741	11.8	9.8	13.8

Source: U.S. Bureau of the Census, Current Population Reports,
Series P-25, No. 965 (March 1985)

Race/Color

Total U.S. Population (Including Armed Forces Overseas) By Race
July 1, 1980, 1983, 1984
(Number in thousands)

	Total		White		Black & Other Races		Black	
	No.	%	No.	% of Total	No.	% of Total	No.	% of Total
July 1:								
1984	236,681	100.0	201,358	85.1	35,323	14.9	28,609	12.1
1983	234,538	100.0	199,960	85.3	34,578	14.7	28,195	12.0
1980	227,738	100.0	195,549	85.9	32,189	14.1	26,905	11.8
Median age								
1984 (years)	31.2		32.2		26.5		26.3	

Source: U.S. Bureau of the Census, Current Population Reports,
Series P-25, No. 965 (March 1985)

From 1980 to 1984, the total population of the U.S. (including Armed Forces overseas) increased 3.9%. In this same period, the White population increased 3.0% while the number of Blacks and other races increased 9.7%. Higher fertility rates are noted among the non-White population than reported for Whites. Higher mortality rates, resulting in shorter life spans, are factors in the younger median age of Black and other races in the population.

Hispanics:

An advance report based on the March 1985 survey covering the civilian non-instutional population of the U.S. and Armed Forces living off post or with their families on post, and covering, specifically, persons of Spanish origin (Hispanics), was released in December 1985 by the U.S. Census Bureau. This includes people who are also counted in either the White or Black population totals. (In 1980, 55% were of the White Race).

(continued)

POPULATION TRENDS

Total Population

Race/Color

Hispanics: (continued)

In March 1985, there were 16.9 million persons of Spanish origin in the U.S., representing a gain of about 2.3 million persons (16%) over the 1980 census figure of 14.6 million. This sizeable increase was the result of high fertility and the resulting large natural increase, as well as of substantial immigration to the U.S. from Mexico, Cuba and other Spanish-speaking countries of Central and South America. In this same period, the total measured U.S. population rose only 3.3%; the non-Spanish-origin segment, only 2.4%.

Hispanics constituted 7.2% of the U.S. population in 1985 compared with 6.4% in 1980. Six out of 10 Hispanics in the country are of Mexican origin; those of Puerto Rican origin are the next largest group.

Persons of Spanish Origin in the U.S. By Original Origin: 1980, 1985

	Number (thous.)		Percent of U.S. Total		Percent by Origin	
	1985	1980	1985	1980	1985	1980
Total population	234,066	226,546	100.0	100.0	--	--
Total Spanish origin	16,940	14,604	7.2	6.4	100.0	100.0
Mexican	10,269	8,679	4.4	3.8	60.6	59.4
Puerto Rican	2,562	2,005	1.1	0.9	15.1	13.7
Cuban	1,036	806	0.4	0.4	6.1	5.5
Central or South America	1,722	3,114	0.7	1.4	10.2	21.3
Other Spanish	1,350		0.6		8.0	
Not of Spanish origin	217,126	211,942	92.8	93.6	--	--

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 403 Advance Report (Issued December 1985)

An analysis by Sales & Marketing Management Magazine showed a high concentration of the Hispanic population (about 70%) living in 25 large metropolitan areas. The largest concentration was in Los Angeles-Long Beach, where 31.1% of the total population in 1985 was of Spanish origin, with the total numbering 2.5 million. There were about 1.6 million in the New York Metropolitan Area, 18.6% of the area's total population. In some areas, with smaller counts covering the Spanish-origin population, this group represented over 80% of the area's total population.

POPULATION TRENDS

Total Population

Hispanics: (continued)

The 25 Leading Hispanic Metros, 1984

Metro Area	1984 Hispanic Population (thous.)	% of Metro. Area Population
Los Angeles-Long Beach	2,462.5	31.1%
New York	1,562.1	18.6
Miami-Hialeah	729.4	41.5
San Antonio	608.2	51.1
Chicago	559.4	9.2
Houston	535.8	16.9
Riverside-San Bernardino	383.0	21.0
El Paso	368.3	68.4
Anaheim-Santa Ana	351.5	16.7
San Diego	347.3	16.6
McAllen-Edinburg-Mission	304.2	89.3
San Jose	271.7	19.7
Phoenix	242.0	13.9
Dallas	228.6	10.2
Oakland	222.6	11.9
Brownsville-Harlingen	204.5	84.7
Corpus Christi	199.8	55.8
San Francisco	191.9	12.6
Fresno	188.1	33.0
Albuquerque	173.4	37.3
Denver	172.7	10.7
Jersey City	163.0	29.7
Newark	145.0	7.8
Oxnard-Ventura	143.7	24.1
Sacramento	133.4	10.7

Source: Sales & Marketing Management, 1985 Survey of Buying Power

A similar analysis by Sales & Marketing Management showed the 1983 concentration of the Black population (which includes those of Spanish origin) by leading Metro Area, of which the top 10 are shown below.

The 10 Leading Black Metros, 1983

Metro Market	1983 Black Population (thous.)	% of Metro Area Total Population
1. New York	2,012.8	24.4%
2. Chicago	1,378.1	22.9
3. Los Angeles-Long Beach	992.1	12.9
4. Philadelphia	898.3	19.0
5. Washington	885.3	26.3
6. Detroit	864.5	19.9
7. Houston	612.0	19.4
8. Baltimore	566.1	25.2
9. Atlanta	555.4	23.9
10. New Orleans	433.8	32.6

Source: Sales & Marketing Management, 1984 Survey of Buying Power

POPULATION TRENDS

Total Population

Race/Color

The fastest growing minority group in the U.S. is composed of Asians and Pacific Islanders. Between 1970 and 1980, this group grew by 142%, totaling about 3.7 million. By 1990, they are expected to number about 5.9 million and by 2000, over 8.0 million. This includes people classified as Chinese, Asian, Indian, Japanese, Korean, Filipino, Vietnamese, Hawaiian, Pakistanis, etc.

According to data compiled by the Population Reference Bureau, about one-third of Asian Americans in 1980 were living in California. That state's share of this population group is expected to remain above 30% for the forseeable future, with a population of some 2.7 million Asians by the year 2000, up from 1.3 million in 1980.

In 1980, the Chinese represented the biggest single group of Asian Americans, but are expected to be outnumbered by Filipino Americans by the year 1990. By the end of this decade, according to the Bureau, both Filipinos and Chinese are expected to number more than 1 million.

Projections:

In May 1984, the U.S. Bureau of the Census issued a series of three projections on the U.S. population by age, sex and race, 1983 to 2080. Each series was based on different assumptions regarding future fertility, mortality, and net immigration levels. In this report, the "middle" of the three series is used, which proved to be fairly close to later Census Bureau population estimates. In 1984, according to figures released by the Bureau in March 1985, the total population, including Armed Forces overseas, was reported at 236,681,000. This compares with the middle series projection totaling 236,416,000. Differences between the current figures and projected figures by age groups varied in size, as noted in the following table.

Most growth over the next century will occur in the next 50 years, with the total population rising to an estimated 305 million by 2030, based on the middle series of projections. From 2030 to 2080, the growth will total less than six million.

Projections, in any event, show that the Nation is now aging rapidly. The median age rose from 29.4 years in 1960 to 31.2 years by 1984. Based on assumptions that there would be a small rise in fertility, steady increases in life expectancy, and that net legal immigration will remain at recent levels, the median age is expected to reach 33.0 years by 1990, 36.3 years by the year 2000.

The ratio of the working-age population (age 18-to-64), compared to the retirement age population is declining. In 1982, for every person 65 or older in the Nation, there were 5.3 people of working age. The ratio will drop to 4.7 in 2000, then to 2.7 in 2030, and to 2.4 in 2080.

The dominant characteristic in U.S. population projections is the shift to older age groups as the years progress and the baby boomers get older. The total population aged 18 to 24, which was at an all-time high of 30.4 million in 1981, has been declining and will reach an estimated total of only 24.1 million by 1994. The biggest numerical growth by 1994 will be in the population age 30 to 44 years--increasing from 50.4 million in 1984 to some 63.3 million.

POPULATION TRENDS

Total Population

Projections (continued)

The non-White segment of the population will increase its representation in the total from 14.9% in 1984 to 16.9% in the year 2000, rising to 20.7% in 2030 and to 25.5% in the year 2080. The proportion of Blacks in the overall non-White segment, which stood at 90% in 1970, dropped to 81% in 1984 and is expected to hold at about that level until 2000, then decline again.

Projections of the U.S. Population--1984, 1994, 2005
(Middle Series*)

	Number (Thousands)				% Change	Percent Distribution		
	1984**	1984*	1994*	2005*	2005/1984*	1984*	1994*	2005*
Total, all ages	236,681	236,416	257,714	275,677	+ 16.6%	100.0%	100.0%	100.0%
Under 5 years	17,816	18,232	18,823	17,449	- 4.3	7.7	7.3	6.3
5 to 9 years	16,351	16,219	19,281	17,772	+ 9.6	6.9	7.5	6.5
10 to 15 years	21,251	20,944	21,991	22,865	+ 9.2	8.9	8.5	8.3
16 years & over	181,263	181,021	197,619	217,591	+ 20.2	76.5	76.7	78.9
16 - 19	15,121	15,009	13,138	15,765	+ 0.5	6.3	5.1	5.7
20 - 29	42,958	43,233	36,695	36,516	- 15.5	18.3	14.2	13.2
30 - 44	50,392	50,228	63,330	58,408	+ 16.3	21.2	24.6	21.2
45 - 54	22,436	22,355	30,156	41,216	+ 84.4	9.4	11.7	15.0
55 - 64	22,316	22,210	20,793	29,459	+ 32.6	9.4	8.1	10.7
Median age (years)	31.2	31.1	34.3	37.6	+ 20.9	—	—	—

* Middle in a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

**Later Census Bureau estimates for 1984 (issued March 1985).

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census, Current Population Reports
Series P-25, No. 952 (May 1984)
Series P-25, No. 965 (March 1985)

POPULATION TRENDS

Total Population

Projections (continued)

U.S. Population by Single Years of Age (Infants, Children, Youths) & Older Groups Middle Series Projections* - 1984, 1994 & Actual 1984

(Numbers in thousands)

		Total		Male		Female	
	1984**	1984*	1994*	1984*	1994*	1984*	1994*
Total, all ages	236,681	236,416	257,714	115,073	125,464	121,343	132,251
Under 5 years	17,816	18,232	18,823	9,329	9,635	8,904	9,188
Under 1 year	3,637	3,734	3,671	1,912	1,880	1,822	1,792
1 year	3,547	3,684	3,721	1,886	1,905	1,798	1,816
2 years	3,542	3,646	3,770	1,865	1,930	1,781	1,840
3 years	3,556	3,598	3,814	1,841	1,952	1,757	1,862
4 years	3,535	3,570	3,847	1,825	1,969	1,745	1,878
5 to 9 years	16,351	16,219	19,281	8,296	9,866	7,924	9,415
5 years	3,403	3,367	3,868	1,723	1,979	1,645	1,888
6 years	3,299	3,237	3,874	1,655	1,982	1,582	1,892
7 years	3,334	3,254	3,867	1,664	1,979	1,589	1,888
8 years	3,085	3,150	3,849	1,610	1,970	1,539	1,880
9 years	3,230	3,211	3,823	1,643	1,956	1,568	1,867
10 to 14 years	17,567	17,295	18,552	8,845	9,487	8,450	9,064
10 years	3,230	3,142	3,788	1,607	1,938	1,535	1,850
11 years	3,286	3,269	3,746	1,671	1,916	1,598	1,829
12 years	3,481	3,391	3,711	1,734	1,898	1,657	1,814
13 years	3,817	3,746	3,666	1,916	1,875	1,829	1,791
14 years	3,752	3,748	3,640	1,917	1,860	1,831	1,780
15 to 19 years	18,805	18,658	16,577	9,516	8,470	9,143	8,107
15 years	3,684	3,649	3,439	1,863	1,758	1,786	1,681
16 years	3,603	3,563	3,309	1,818	1,691	1,744	1,618
17 years	3,668	3,652	3,326	1,861	1,700	1,791	1,626
18 years	3,728	3,774	3,221	1,926	1,645	1,848	1,596
19 years	4,122	4,020	3,282	2,047	1,676	1,973	1,606
20 to 24 years	21,525	21,706	17,636	11,018	8,974	10,689	8,662
25 to 29 years	21,433	21,527	19,059	10,803	9,631	10,724	9,429
30 to 34 years	19,674	19,493	22,097	9,701	11,120	9,792	10,977
35 to 39 years	16,862	17,056	21,742	8,433	10,841	8,623	10,901
40 to 44 years	13,856	13,679	19,491	6,715	9,639	6,964	8,592
45 to 64 years	44,752	44,565	52,322	21,202	25,192	23,362	27,130
65 & over	28,040	27,986	33,507	11,217	13,302	16,768	20,205

* Middle in a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

**Later count reported in Current Population Reports Series P-25, No. 965 (issued March 1985)

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, No. 952 (issued May 1984)

Projections (continued)

As previously noted, the biggest growth in the next 10 years will be in the population, aged 30 to 44. This is very good for marketers of many types of consumer goods, as well as housing and services. this age bracket includes the bulk of the population in new households, those building new homes and those raising families. A high percentage are in two-income households, representing an increasingly affluent market.

This affluence gives the group an even greater importance in the marketplace, beyond their growing numbers, and it is therefore worthy of special attention. As the baby boomers age, the older end of the 30-to-44-year-age will be showing the greatest growth. By 1994, the population 40-44 years of age is expected to register an increase of 42.5% compared with 1984; those aged 35 to 39 years will gain 27.5%; the population 30 to 34 years will rise 13.3%.

The population in the 30-to-44-year-age group will represent about one-fourth of the total U.S. population in 10 years, compared with 21.2% in 1984.

Population By Regions & States:

The West and South have dominated population growth in the U.S. in the current decade, representing 94% of the nation's 7.4 million gain between 1980 and 1983. According to provisional projections of the population of States, issued by the U.S. Census Bureau in 1983, patterns of growth noted for the 1980's will continue for the remainder of the century.

Regionally, the West will continue to be the fastest growing region of the country, with the population increasing 22.2% from 1980 to 1990, and 18.1% from 1990 to 2000. Following the West, the South will maintain its pace as the second fastest growing region, increasing by 15.9% from 1980 to 1990, and 12.8% from 1990 to 2000. However, the South will add more people than any other region, increasing its population size by almost 24 million between 1980 and 2000. By 2000, 37% of the population will live in the South, 23% in the West.

The Midwest region, projected to grow only 2% in this decade, will not grow in the 1990's. The Northeast will continue to lose population, declining 1.7% from 1980-1990, and more than 50% from 1990 to 2000.

New Hampshire and Florida are the only states east of the Mississippi that will grow at more than twice the U.S. rate, while 10 states west of the Mississippi will grow that fast. Nevada is projected to grow most rapidly on a percentage basis (59% in 1980 to 1990, and more than 50% from 1990-2000), followed by Wyoming, Arizona and Utah. Florida, California and Texas will add the most people by the end of this century, each increasing by 6 million from 1980 to 2000. California wil have 11% of the population by the end of the century and continue to be the largest state.

Overall, the 65 and older population will increase from 11.2% of the total in 1980 to 13.1% in 2000. The Northeast will continue to have the oldest age distribution, with about 15% of its population aged 65 and over. The West will have the youngest age distribution, with only 11% of its population over 65, and over 22% below age 15, 45% between the ages of 15 and 44.

Compared with the age distribution of the U.S., as a whole, the South will have a greater proportion of elderly and lower proportions of persons age 15 to 44. The Midwest will have a higher proportion of its population below age 15. Thus these two regions will have the highest dependency ratios (persons under 15 and over 64 divided by persons 15 through 64) in the year 2000.

POPULATION TRENDS

Population By Regions & States

Projections of the Population of Regions, by Age: 1980 to 2000
(In thousands)

	Total	Under 15 Years	15 to 44 Years	45 to 64 Years	65 Years & Over
TOTAL RESIDENT POPULATION					
April 1, 1980 (r)					
U.S. total	226,546	51,290	105,204	44,503	25,549
Northeast	49,135	10,383	22,151	10,530	6,072
Midwest*	58,866	13,612	27,079	11,482	6,692
South	75,372	17,455	34,989	14,440	8,488
West	43,172	9,841	20,984	8,049	4,298
July 1, 1990					
U.S. total	249,203	54,575	116,354	46,474	31,799
Northeast	48,423	9,441	22,293	9,778	6,912
Midwest*	60,265	13,629	27,791	11,190	7,656
South	87,594	19,255	40,635	16,301	11,403
West	52,920	12,250	25,636	9,205	5,829
July 1, 2000					
U.S. total	267,462	55,900	115,660	60,866	35,036
Northeast	46,401	8,677	19,626	11,271	6,828
Midwest*	59,714	12,856	25,590	13,505	7,763
South	98,828	20,544	42,272	22,430	13,582
West	62,519	13,823	28,172	13,660	6,864
PERCENT OF U.S. TOTAL					
1980(r)					
U.S. Total	100.00	100.00	100.00	100.00	100.00
Northeast	21.69	20.24	21.06	23.67	23.77
Midwest*	25.98	26.55	25.74	25.89	26.20
South	33.27	34.03	33.26	32.44	33.21
West	19.06	19.18	19.95	18.09	16.82
1990					
U.S. Total	100.00	100.00	100.00	100.00	100.00
Northeast	19.43	17.30	19.16	21.04	21.74
Midwest*	24.18	24.97	23.88	24.08	24.07
South	35.15	35.28	34.92	35.08	35.86
West	21.24	22.45	22.03	19.81	18.33
2000					
U.S. Total	100.00	100.00	100.00	100.00	100.00
Northeast	17.35	15.52	16.97	18.52	19.49
Midwest*	22.33	23.00	22.12	22.19	22.16
South	36.95	36.75	36.55	36.85	38.77
West	23.38	24.73	24.36	22.44	19.59

* Formerly the North Central Region
(r) revised

Source: U.S. Bureau of the Census, Current Population Reports, Projections: Series P-25, No. 937 (issued August 1983) and 1980; P-25, No. 970 (issued June 1985)

Population By Regions & States (continued)

The Resident Population of States, 1980, 1984 & Projected to 1990 & 2000
(Numbers in thousands)

					Percent Distribution		
	1980(r)	1984	1990	2000	1980	1990	2000
U.S. total	226,546	236,158	249,203	267,461	100.00	100.00	100.00
New England	12,348	12,577	12,733	12,775	5.45	5.11	4.78
Maine	1,125	1,156	1,229	1,308	0.50	0.49	0.49
New Hampshire	921	977	1,139	1,364	0.41	0.46	0.51
Vermont	511	530	575	625	0.23	0.23	0.23
Massachusetts	5,737	5,798	5,704	5,490	2.53	2.29	2.05
Rhode Island	947	962	951	926	0.42	0.38	0.35
Connecticut	3,108	3,154	3,136	3,062	1.37	1.26	1.14
Middle Atlantic	36,787	37,151	35,690	33,625	16.24	14.32	12.57
New York	17,558	17,735	16,457	14,990	7.75	6.60	5.60
New Jersey	7,365	7,515	7,513	7,428	3.25	3.01	2.78
Pennsylvania	11,864	11,901	11,720	11,208	5.24	4.70	4.19
East North Central	41,682	41,601	42,372	41,647	18.40	17.00	15.57
Ohio	10,798	10,752	10,763	10,357	4.77	4.32	3.87
Indiana	5,490	5,498	5,679	5,679	2.42	2.28	2.12
Illinois	11,427	11,511	11,502	11,187	5.04	4.62	4.18
Michigan	9,262	9,075	9,394	9,208	4.09	3.77	3.44
Wisconsin	4,706	4,766	5,033	5,215	2.08	2.02	1.95
West North Central	17,183	17,515	17,894	18,067	7.59	7.18	6.76
Minnesota	4,076	4,162	4,358	4,489	1.80	1.75	1.68
Iowa	2,914	2,910	2,983	2,972	1.29	1.20	1.11
Missouri	4,917	5,008	5,077	5,080	2.17	2.04	1.90
North Dakota	653	686	678	682	0.29	0.27	0.25
South Dakota	691	706	698	688	0.30	0.28	0.26
Nebraska	1,570	1,606	1,640	1,662	0.69	0.66	0.62
Kansas	2,364	2,438	2,463	2,494	1.04	0.99	0.93
South Atlantic	36,959	39,450	43,144	48,975	16.31	17.31	18.31
Delaware	594	613	630	638	0.26	0.25	0.24
Maryland	4,217	4,349	4,491	4,582	1.86	1.80	1.71
District of Columbia	638	623	501	376	0.28	0.20	0.14
Virginia	5,347	5,636	5,961	6,389	2.36	2.39	2.39
West Virginia	1,950	1,952	2,037	2,067	0.86	0.82	0.77
North Carolina	5,882	6,165	6,473	6,868	2.59	2.60	2.57
South Carolina	3,122	3,300	3,560	3,907	1.38	1.43	1.46
Georgia	5,463	5,837	6,175	6,708	2.41	2.48	2.51
Florida	9,746	10,976	13,316	17,438	4.30	5.34	6.52
East South Central	14,666	15,028	16,121	17,174	6.47	6.47	6.42
Kentucky	3,661	3,723	4,073	4,400	1.62	1.63	1.65
Tennessee	4,591	4,717	5,073	5,420	2.03	2.04	2.03
Alabama	3,894	3,990	4,214	4,415	1.72	1.69	1.65
Mississippi	2,521	2,598	2,761	2,939	1.11	1.11	1.10

(continued)

Population By Regions & States (continued)

The Resident Population of States, 1980, 1984 & Projected to 1990 & 2000

(Numbers in thousands)
(continued)

	1980(r)	1984	1990	2000	Percent Distribution 1980	Percent Distribution 1990	Percent Distribution 2000
West South Central	23,747	26,098	28,329	32,679	10.48	11.37	12.22
Arkansas	2,286	2,349	2,580	2,835	1.01	1.04	1.06
Louisiana	4,206	4,462	4,747	5,160	1.86	1.90	1.93
Oklahoma	3,025	3,298	3,503	3,944	1.34	1.41	1.47
Texas	14,229	15,989	17,498	20,739	1.68	7.02	7.75
Mountain	11,373	12,553	15,404	20,140	5.02	6.18	7.53
Montana	787	824	888	963	0.35	0.36	0.36
Idaho	944	1,001	1,214	1,512	0.42	0.49	0.57
Wyoming	470	511	701	1,022	0.21	0.28	0.37
Colorado	2,890	3,178	3,755	4,657	1.28	1.51	1.74
New Mexico	1,303	1,424	1,536	1,727	0.57	0.62	0.65
Arizona	2,718	3,053	3,994	5,583	1.20	1.60	2.09
Utah	1,461	1,652	2,040	2,777	0.65	0.82	1.04
Nevada	800	911	1,275	1,919	0.35	0.51	0.72
Pacific	31,800	34,184	37,516	42,379	14.04	15.05	15.84
Washington	4,132	4,349	5,012	5,833	1.82	2.01	2.18
Oregon	2,633	2,674	3,319	4,025	1.16	1.33	1.50
California	23,668	25,622	27,526	30,613	10.45	11.05	11.45
Alaska	401	500	522	631	0.18	0.21	0.24
Hawaii	965	1,039	1,138	1,278	0.43	0.46	0.48

(r) revised

Source: U.S. Bureau of the Census Projections: P-25, No. 937 (issued August 1983); 1980, 1984: P-25, No. 970 (issued June 1985)

Metropolitan-Nonmetropolitan Markets

In the 1970's, nonmetropolitan areas were growing at a faster rate, in terms of population, than metropolitan areas. This trend has now been reversed as nonmetropolitan area growth has slowed considerably.

Metropolitan Statistical Areas (MSAs) with a population of a million or more are registering the fastest growth. Metropolitan area growth in the South and West continues to be rapid, although slowing moderately since the 1970's. Growth in the Northeast has resumed since 1980 after a decade of no change. In both the Northeast and Midwest, the population outside metropolitan areas is increasing at about the same rate as the metropolitan population; in the 1970's the non-metro area growth was much more rapid.

Metro area central cities are growing faster than in the 1970's, particularly in the Northeast and Midwest, and suburban population increase has slowed. Only seven of the 23 central cities of 500,000 or more have lost population since 1980, compared with 13 in the previous decade.

Metropolitan-Nonmetropolitan Markets (continued)

Population By Metropolitan Status for Regions: 1970, 1980, 1984
(Numbers in millions)

	July 1, 1984 (estimate)	April 1, 1980 (Census)	April 1, 1970 (Census)	Percent Change		Average Annual Percent Change	
				1984/ 1980	1980/ 1970	1984/ 1980	1980/ 1970
Total U.S. population	236.2	226.5	203.3	4.2	11.4	1.0	1.1
Northeast	49.7	49.1	49.1	1.2	0.2	0.3	—
Midwest	59.1	58.9	56.6	0.4	4.0	0.1	0.4
South	80.6	75.4	62.8	6.9	20.0	1.6	1.8
West	46.7	43.2	34.8	8.3	23.9	1.9	2.1
Inside MSA's, total	179.7	172.0	155.5	4.5	10.6	1.0	1.0
Northeast	43.8	43.3	43.7	1.1	-1.0	0.3	-0.1
Midwest	41.6	41.5	40.4	0.4	2.7	0.1	0.3
South	55.6	51.4	42.2	8.1	21.8	1.8	2.0
West	38.7	35.8	29.2	8.2	22.7	1.9	2.0
Inside Central Cities	74.5	72.5	72.0	2.7	0.8	0.6	0.1
Northeast	16.5	16.6	18.5	-0.2	-10.4	-0.1	-1.1
Midwest	17.6	17.8	19.5	-1.6	- 8.5	-0.4	-0.9
South	23.9	22.7	20.7	5.3	9.5	1.2	0.9
West	16.4	15.4	13.2	6.8	16.4	1.6	1.5
Outside Central Cities	105.2	99.4	83.5	5.9	19.0	1.3	1.7
Northeast	27.2	26.7	25.2	2.0	5.8	0.5	0.6
Midwest	24.1	23.6	20.9	1.9	13.1	0.4	1.2
South	31.7	28.7	21.5	10.3	33.7	2.3	2.9
West	22.3	20.4	15.9	9.3	27.9	2.1	2.5
Outside MSA's total	56.4	54.6	47.8	3.4	14.3	0.8	1.3
Northeast	5.9	5.8	5.3	1.9	9.9	0.4	0.9
Midwest	17.5	17.4	16.2	0.5	7.4	0.1	0.7
South	25.9	24.0	20.6	4.3	16.3	1.0	1.5
West	8.0	7.4	5.7	8.3	30.3	1.9	2.6

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, No. 976 (issued Oct. 1985)

Metropolitan-Nonmetropolitan Markets (continued)

Population of Metropolitan Statistical Areas' Central Cities of 500,000 & Over 1980, 1984

Rank	MSA Central City	July 1, 1984 (estimate)	April 1, 1980 (Census)	Average Annual Percent Change	
				1984/ 1980	1980/ 1970
1	New York, NY	7,164,700	7,071,639	0.31	-1.10
2	Los Angeles, CA	3,096,700	2,968,579	0.99	0.54
3	Chicago, IL	2,992,500	3,005,072	-0.10	-1.14
4	Houston, TX	1,705,700	1,595,138	1.58	2.57
5	Philadelphia, PA	1,646,700	1,688,210	-0.59	-1.44
6	Detroit, MI	1,089,000	1,203,369	-2.35	-2.30
7	Dallas, TX	974,200	904,599	1.74	0.69
8	San Diego, CA	960,500	875,538	2.18	2.27
9	Phoenix, AZ	853,300	789,704	1.81	3.02
10	San Antonio, TX	842,800	785,927	1.64	1.84
11	Baltimore, MD	763,600	786,741	-0.70	-1.41
12	San Francisco, CA	712,800	678,974	1.14	-0.53
13	Indianapolis, IN	710,300	700,807	0.32	-0.50
14	San Jose, CA	686,200	629,402	2.03	3.14
15	Memphis, TN	648,400	646,170	0.08	0.35
16	Washington, D.C.	622,800	638,432	-0.58	-1.70
17	Milwaukee, WI	620,800	636,298	-0.58	-1.20
18	Jacksonville, FL	578,000	540,920	1.56	0.70
19	Boston, MA	570,700	562,944	0.32	-1.30
20	Columbus, OH	566,100	565,032	0.05	0.45
21	New Orleans, LA	559,100	557,927	0.05	-0.62
22	Cleveland, OH	546,500	573,822	-1.15	-2.69
23	Denver, CO	504,600	492,694	0.56	-0.44

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, No. 976 (issued October 1985)

In the 1980-1984 period, the fastest-growing MSA was Midland, Texas (population growth: +37.5%; Anchorage, Alaska was second (+29.9%); Naples, Florida (+28.9%); Ocala, Florida (+27%); Fort Pierce, Florida (+25.8%).

Metropolitan-Nonmetropolitan Markets (continued)

The Top 10 Consolidated Metropolitan Areas (CMSA's) Based On Population July 1, 1984
(& Selected Largest Primary MSA's)

	Population	% Change 1984/1980
1. New York-Northern New Jersey-Long Island CMSA	17,807,100	1.5
New York, N.Y., PMSA (Primary Metropolitan Statistical Area)	8,376,900	1.2
Nassau-Suffolk, N.Y. PMSA	2,753,400	1.8
2. Los Angeles-Anaheim-Riverside, CA CMSA	12,372,600	7.6
Los Angeles-Long Beach, CA PMSA	7,901,200	5.7
Anaheim-Santa Ana, CA PMSA	2,075,800	7.4
3. Chicago-Gary-Lake County, IL-IN-WI CMSA	8,035,000	1.2
Chicago, IL PMSA	6,128,300	1.1
4. Philadelphia-Wilmington-Trenton, PA-NJ-DE-MD CMSA	5,755,300	1.3
Philadelphia, PA-NJ PMSA	4,768,400	1.1
5. San Francisco-Oakland-San Jose, CA CMSA	5,584,600	5.9
Oakland, CA PMSA	1,871,400	6.2
San Francisco, CA PMSA	1,541,900	3.6
San Jose, CA PMSA	1,371,500	5.9
6. Detroit-Ann Arbor, MI CMSA	4,577,100	- 3.7
Detroit, MI PMSA	4,315,800	- 3.8
7. Boston-Lawrence-Salem, MA NH CMSA	4,026,600	1.4
Boston, MA PMSA	2,820,700	0.5
8. Houston-Galveston-Brazoria, TX CMSA	3,565,700	15.0
Houston, TX PMSA	2,164,200	15.7
9. Washington, DC-MD-VA MSA	3,429,400	5.5
10. Dallas-Fort Worth, TX CMSA	3,348,000	14.2
Dallas, TX PMSA	2,203,700	12.6
Fort Worth-Arlington, TX PMSA	1,144,400	17.6

Source: U.S. Bureau of the Census, Current Population Reports, Series P-25, No. 976.

The 10 largest Consolidated Metropolitan Statistical Areas had a total population of 68.6 million, or 29% of the U.S. total resident population, and 38% of the metropolitan population.

Mobility/Migration Patterns

The annual mobility rate--the percent of the population 1 year old and over who have moved to a different house within the year--has continued to decline since the 1960's. Between 1960 and 1961, about 20% of the population moved within the U.S. Between 1982 and 1983, the rate declined to 16.6%.

(continued)

Mobility/Migration Patterns (continued)

Annual Rates of Mobility: 1960-1983
(Population 1 Year of Age & Older)

		Different House in the U.S.					
				Different County			
Period	Total Movers (thous.)	Total	Same County	Total	Same State	Different State	Movers From Abroad
1960-61	36,533	20.0	13.7	6.3	3.1	3.2	0.5
1970-71	37,705	17.9	11.4	6.5	3.1	3.4	0.8
1980-81	38,200	16.6	10.4	6.2	3.4	2.8	0.6
1981-82	38,127	16.6	10.3	6.2	3.3	3.0	0.5
1982-83	37,408	16.1	10.1	6.0	3.3	2.7	0.4

Source: U.S. Bureau of the Census, Current Population Reports, Population Characteristics, Series P-20, No. 393

Of more concern to marketers than simple mobility rates, however, are changing patterns in migration. This pattern is, of course, sharply affected by economic conditions--plant shutdowns, labor supply conditions, concentration of new high-tech industries for competition and other reasons, etc. Changes in the age composition of the population also play a role. Young adults have the highest mobility rates, but basic trends on regional moves are also affected by the aging population. These moves bring changing demand for consumer goods and services.

Some information on basic trends in migration patterns has become available through data compiled by the IRS which tracks federal income tax returns. These reports confirm information available through other indicators that migration patterns are changing, and the Northeast is making a comeback. Growth in the South and West continues at a strong pace, but the West has lost ground to the South. Some moderation in the rate of migration to both of these regions can be expected in the future.

In 1982-83, the Northeast accounted for 14.2% of inter-regional migrants compared to a low 12.5% in 1978-79. Migrants to the Midwest represented 18.7% of the IRS total in 1982-83, down from a high of 21.9% in 1976-77, mainly due to economic conditions and technological changes in manufacturing.

According to an analysis of IRS data by American Demographics, of the nine census divisions in the U.S., the East South Central (Ky., Tenn., Miss., Ala.) has shown the most pervasive decline in the share of inter-divisional migrants it attracts. On the other hand, the West South Central and South Atlantic divisions have greatly increased their share of migrants, much more than the West.

MARRIAGES & MARITAL STATUS

Marriages:

The chief development in recent years with regard to marriages is the steep increase (which started in the 1970's) in the proportion of people who are delaying marriage. This trend has accelerated in the first half of the 1980's. According to the Census Bureau, over 58% of women aged 20 to 24 in 1985 have never been married, up from 50% in 1980 and 36% in 1970.

In 1984, the median age for men to marry for the first time was 25.4 years; for women, 23.0 years. This was the highest level for women since 1890 (the first year recorded); for men, the rate was the third highest, ranking next to a median age of 25.9 years in 1900; 26.1 years in 1890.

The trend toward the postponement of marriage is also increasingly apparent among older age groups. The proportion of men and women in age groups 25 to 29 and 30 to 34 who have never married has approximately doubled since 1970. Among women aged 25 to 29, the proportion never married rose to 26% in 1984 from 11% in 1970; for men in this age group, the proportion rose from 19% to 38%; in the 30 to 34 year group, 'never-marrieds' represented 13% of the women and 21% of the men in 1984 compared with 6% and 9%, respectively, in 1970.

Percent of Single Population (Never Married) in Selected Age Groups 1970, 1980, 1984 & Median Ages At First Marriage

	Women			Men		
	1984	1980	1970	1984	1980	1970
40 years of age & over	5.0%	5.1%	6.2%	5.8%	5.7%	7.4%
Under 40 years	39.7	38.8	38.5	49.9	48.8	47.7
20 to 24 years	56.9	50.2	35.8	74.8	68.8	54.7
25 to 29 years	25.9	20.9	10.5	37.8	33.1	19.1
30 to 34 years	13.3	9.5	6.2	20.9	15.9	9.4
35 to 39 years	7.5	6.2	5.4	11.6	7.8	7.2
Median age at first marriage (years)	23.0	22.0	20.8	25.4	24.7	23.2

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 399

The marriage rate in 1985, according to preliminary figures issued by the National Center for Health Statistics, was 10.2 per 1,000 population, down from the 10.5 rate recorded for both 1984 and 1983, and the lowest rate reported since 1977. A total of 2,425,000 marriages took place last year, representing a 2.5% decline from the total of 2,487,000 reported for the year 1984.

On the basis of the nine major regions of the country, most marriages in 1984 (18%) were concentrated in the South Atlantic, particularly in Florida, which has almost a 5% share of all U.S. marriages that year. The second biggest region in terms of share of marriages was the Middle Atlantic (13.3%). New York State, alone, accounted for 7.1% of the U.S. total; New York City, for 3.1%.

MARRIAGES & MARITAL STATUS

Marriages:

The seasonal pattern in marriages showed the traditional concentration in June in 1984. This month accounted for 12.3% of the year's ceremonies, followed in August with a 10.7% share; September, 10%.

Percent of Marriages by Region of the U.S., 1984

U.S. Total	100.0%
New England	4.7
Middle Atlantic	13.3
East North Central	15.4
West North Central	6.8
South Atlantic	18.0
East South Central	7.0
West South Central	12.8
Mountain	9.3
Pacific	12.7

Source: Based on National Center for Health Statistics reports.

Marriages & Marriage Rates by Month, 1982, 1983, 1984

	1984 Percent	Number (thousands)			Rate per 1,000 Population			Rate per 1,000 Women 15-44
		1984	1983	1982	1984	1983	1982	1984
Total	100.0%	2,487	2,444	2,495	10.5	10.5	10.8	nr
January	5.1	128	132	133	6.4	6.7	6.8	27.2
February	6.6	164	143	141	8.8	8.0	8.0	37.1
March	6.2	153	162	164	7.7	8.2	8.4	32.4
April	6.9	173	185	193	9.0	9.6	10.2	37.8
May	9.2	230	231	239	11.5	11.7	12.2	48.5
June	12.3	305	289	290	15.8	15.1	15.3	66.6
July	9.2	229	228	250	11.5	11.5	12.7	48.3
August	10.7	265	272	253	13.3	13.7	12.9	55.9
September	10.0	249	236	237	12.9	12.3	12.4	54.2
October	8.1	201	195	225	10.0	9.8	11.4	42.3
November	7.8	194	188	181	10.0	9.8	9.5	42.0
December	7.9	196	183	183	9.8	9.2	9.5	41.2

nr not reported

Source: National Center for Health Statistics, *Monthly Vital Statistics Report*

Divorces

Divorced persons represented 9% of the population ever married as of the year 1984, compared with 4% in 1970 and 3% in 1960. The divorce ratio, which measures the number of currently divorced persons per 1,000 currently married persons who live with their spouses, was 121 in 1984, more than twice the figure of 47 in 1970. The divorce ratio was highest among Blacks in 1984 (240 vs. 113 for Whites and 112 for Hispanics). It was highest in the population age 30 to 34 and 35 to 44, which had 1984 divorce ratios of 153 and 160, respectively, compared with 105 for the population under 30 and 70 for the population age 65 and older, according to the Census Bureau.

(continued)

MARRIAGES & MARITAL STATUS

Divorces (continued)

The National Center for Health Statistics reported total divorces at 1,187,000 in 1985, which was 2.8% above the 1984 total of $1,555,000 and compares with a total of 1,179,000 in 1983. The divorce rate dropped from 5.0 per 1,000 population in 1983 to 4.9 in 1984 but rose to 5.0 again in 1985. In 1981, however, the rate was 5.3

Marital Status:

In 1985, there were 87.0 million men and 95.3 million women of marriageable age (15 years or older by Census Bureau definition). The number of persons who were married and living with their spouse was, of course, the same for both sexes (51.1 million). Widows outnumbered widowers--111.4 million vs. 2.1 million. There were 7.8 million women vs. 5.3 million men who reported themselves to be divorced. Men have a greater tendency to remarry.

Marital Status of Males & Females in the Population, 1985

	Total, 15 Years & Over	Selected Age Groups				
		20-24	25-29	30-34	35-54	55 & over
Males						
Total number (thous.)	87,034	10,055	10,420	9,764	26,181	21,391
Percent	100.0	100.0	100.0	100.0	100.0	100.0
Never married	30.0	75.6	38.7	20.8	8.1	5.7
Married:						
Spouse present	58.7	21.2	52.2	66.0	77.6	78.0
Spouse absent	2.8	1.8	3.0	3.7	3.9	2.5
Separated	1.9	1.0	2.0	2.4	2.9	1.7
Widowed	2.4	--	--	0.1	0.7	8.9
Divorced	6.0	1.4	6.0	9.5	9.6	4.9
Females						
Total number (thous.)	95,282	10,411	10,686	9,987	27,516	27,578
Percent	100.0	100.0	100.0	100.0	100.0	100.0
Never married	22.7	58.5	26.4	13.5	5.9	4.5
Married:						
Spouse present	53.6	34.5	60.2	68.2	72.1	50.6
Spouse absent	3.5	3.4	5.0	4.9	4.7	2.2
Separated	2.8	2.6	4.1	4.2	3.9	1.5
Widowed	11.9	0.2	0.5	1.0	4.1	36.5
Divorced	8.2	3.3	7.9	12.4	13.2	6.2

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 402

HOUSEHOLDS & FAMILIES

Advance information released in October 1985 by the Census Bureau based on the March 1985 Current Population Survey showed a total of 86.8 million households in the U.S. This represented a net increase of about 1.4 million households over the previous year. Since 1980, the number of households has increased by an average of 1.2 million annually, compared with 1.6 million annually averaged from 1970 to 1980.

(continued)

HOUSEHOLDS & FAMILIES

Households are made of two basic categories: familiy households, which are those maintained by a man or a woman living with at least one relative, and nonfamily households, made up of unrelated individuals or persons living alone. Families accounted for about 62.7 million households (or about 72% of the total) in 1985. This share has been dropping; in 1980, family households represented 73.7% of the households; in 1970, 81.2%. Married couple families represented 58% of the 1985 total, down from 60.8% in 1980 and 70.5% in 1970. By contrast, the proportion of households accounted for by families not maintained by married couples was 14% of the total, up from about 11% in 1970. Nonfamily households accounted for almost 28% of total households last year, compared with about 19% in 1970.

The proportion of U.S. households without own children under age 18 dropped from 45.3% in 1970 to 38.4% in 1980; then to 35.8% in 1985. As previously noted, there has been a growing tendency on the part of young adults to postpone marriage. This fact, plus the aging of the population, is reflected in the almost 21 million households consisting of people living alone. This group represented 23.7% of all households in 1985, compared with 22.6% in 1980; 17.1% in 1970; and is a factor in a steady decline in average household size.

Household Composition: 1970, 1980, 1985
(Numbers in thousands)

	1985		1980		1970	
	Number	Percent	Number	Percent	Number	Percent
All households	86,789	100.0	80,776	100.0	63,401	100.0
Family households	62,706	72.3	59,550	73.7	51,456	81.2
No own children under 18	31,594	36.4	28,528	35.3	22,725	35.8
With own children under 18	31,112	35.8	31,922	38.4	28,731	45.3
Married couple family	50,350	58.0	49,112	60.8	44,728	70.5
No own children under 18	26,140	30.1	24,151	29.9	19,196	30.3
With own children under 18	24,210	27.9	24,961	30.9	25,532	40.3
Other family, male householder	2,228	2.6	1,733	2.1	1,228	1.9
No own children under 18	1,331	1.5	1,117	1.4	887	1.4
With own children under 18	896	1.0	616	0.8	341	0.5
Other family, female householder	10,129	11.7	8,705	10.8	5,500	8.7
No own children under 18	4,123	4.8	3,261	4.0	2,642	4.2
With own children under 18	6,006	6.9	5,445	6.7	2,858	4.5
Nonfamily households	24,082	27.7	21,226	26.3	11,945	18.8
Male householder	10,114	11.7	8,807	10.9	4,063	6.4
Living alone	7,922	9.1	6,966	8.6	3,532	5.6
Female householder	13,968	16.1	12,419	15.4	7,882	12.4
Living alone	12,680	14.6	11,330	14.0	7,319	11.5
Average number of persons per household	2.69		2.76		3.14	
Under 18	0.72		0.79		1.09	
Average number of persons per family household	3.23		3.29		3.58	
Under 18	0.98		1.05		1.34	

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 402

HOUSEHOLDS & FAMILIES

The number of households containing two unrelated adults of the opposite sex was 2.0 million in both 1984 and 1985, up from about 1.6 million couples in 1980. The dramatic increase in the number of persons living alone noted in the past 15 years has been one of the most significant changes in household living arrangements. In 1985, there were 20.6 million persons living alone; 7.9 million men and 12.7 million women. The age composition of men and women who live alone is quite different. The men tend to be much younger (median age 41.4 years) than women median age: 65.5 years). At the upper end of the age range, about 26% of the women are at least 75 years of age, compared with only 9% of the men. Due perhaps to the greater tendency noted among young adults to live with parents rather than incur the expense of setting up households of their own, the number of adults under 25 years of age who live alone decreased from 1.7 million in 1980 to 1.3 million in 1985, but was higher than the 556,000 reported for 1970.

Single-Person Households By Sex & Age, 1980, 1985
(Number in thousands)

	1985		1980	
	Number	Percent	Number	Percent
Males living alone	7,922	100.0	6,966	100.0
Under 25 years	750	9.5	947	13.6
25 to 34 years	2,307	29.1	1,975	28.4
35 to 44 years	1,406	17.7	945	13.6
45 to 54 years	865	10.9	804	11.5
55 to 64 years	980	12.4	809	11.6
65 to 74 years	868	11.0	775	11.1
75 years & over	746	9.4	711	10.2
Median age	41.4	--	40.9	--
Females living alone	12,680	100.0	11,330	100.0
Under 25 years	573	4.5	779	6.9
25 to 34 years	1,598	12.6	1,284	11.3
35 to 44 years	916	7.2	525	4.6
45 to 54 years	986	7.8	901	8.0
55 to 64 years	2,109	16.6	2,000	17.7
65 to 74 years	3,262	25.7	3,076	27.1
75 years & over	3,236	25.5	2,766	2.4
Median age	65.5	--	65.6	--

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 402

LIVING ARRANGEMENTS

Children Under 18 Years of Age

Census Bureau data for 1984 shows that generally most children under 18 years of age live with two parents (75% of the total). However, the percentages is higher for Whites (81%) than for Blacks (41%). In 1970, an overall 85% of all children under 18 years lived with two parents.

Children Under 18 Years of Age (continued)

Living Arrangements of Children Under 18 Years: 1970, 1980, 1984

	1984					
	Total	White	Black	Spanish Origin*	1980	1970
All children 18 & under Total (thousands)	62,139	50,620	9,375	5,625	63,427	69,162
Percent	100.0	100.0	100.0	100.0	100.0	100.0
Living with:						
Two parents	74.9	81.0	41.0	70.2	76.7	85.2
One parent	22.6	17.2	53.1	26.8	19.7	11.9
Mother only	20.4	15.1	50.2	24.9	18.0	10.8
Father only	2.2	2.1	2.9	2.0	1.7	1.1
Other relatives only	2.0	1.3	5.0	2.6	3.1	2.2
Nonrelatives only	0.5	0.5	0.9	0.4	0.6	0.7

* Persons of Spanish origin may be of any race.

Source: U.S. Bureau of the Census, Current Population Reports, (Series P-20, No. 399)

Details on the characteristics of parents with whom 60,580,000 children under the age of 18 years lived as of March 1984 were reported by the Census Bureau as noted below.

Children Under 18 Years Living With One or Both Parents, By Characteristics of the Parent: March 1984

	Total, Living With One or Both Parents	Living With		
			One Parent	
		Both Parents	Mother Only	Father Only
Total children (thousands)	60,580	46,555	12,646	1,378
Percent	100.0	100.0	100.0	100.0
Age of parent:*				
Under 25 years	6.5	3.8	16.3	6.6
25 to 34 years	38.0	36.8	43.0	33.3
35 to 44 years	39.8	42.4	30.9	39.8
45 years & over	15.7	17.2	9.7	20.4
Employment of parent:				
Employed	79.1	86.9	50.8	75.3
Unemployed or not in labor force	20.9	13.1	49.2	24.8

(continued)

Children Under 18 Years of Age (continued)

Children Under 18 Years Living With One or Both Parents, By Characteristics of the Parent: March 1984
(continued)

	Total, Living With One or Both Parents	Living With		
			One Parent	
		Both Parents	Mother Only	Father Only
Family income:				
Less than $10,000	21.3	9.8	62.4	30.4
$10,000 to $19,999	22.5	21.6	25.5	25.6
$20,000 to $39,999	37.2	44.4	10.9	34.8
$40,000 or more	19.0	24.1	1.3	9.2
Residence:				
Inside metropolitan areas	66.5	64.8	72.7	66.4
In central cities	27.1	22.9	42.2	29.5
Outside metropolitan areas	33.5	35.2	27.3	33.6

*Note: Characteristics of the reference person are shown for children living with both parents.

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 399

Young Adults

Young adults, 18 to 34 years of age were less likely in 1984 than young adults in 1970 to be maintaining homes of their own and were more likely to be living in the homes of their parents. Most of this change in living arrangements has occurred since 1980, as the cost of living soared.

Between 1970 and 1984, the proportion of men age 18 to 24 years who maintained their own homes as householders or spouses of householders dropped from 35% to 25%; for women, the decline was from 49% to 40%. (The term "householder" refers to the person, or one of the persons, in whose name the housing unit is owned or rented (maintained) or, if there is no such person, any adult member, excluding roomers, boarders or paid employees).

Among young men age 25 to 34, the proportion who were householders or the spouses of householders declined from 86% in 1970 to 77% in 1984 and for women, from 90% to 86%.

LIVING ARRANGEMENTS

Young Adults

Living Arrangements of Young Adults By Sex: 1970, 1984

	1984		1970	
	Men	Women	Men	Women
18 to 24 years				
Total number (thousands)	14,196	14,482	10,398	11,959
Percent	100.0	100.0	100.0	100.0
Householder or spouse of householder	25.2	40.0	35.4	49.0
Child of householder	61.7	46.8	54.2	41.3
Nonrelative of householder	6.8	7.4	7.8	4.5
Other*	6.2	5.8	2.6	5.2
25 to 34 years				
Total number (thousands)	19,876	20,297	11,929	12,637
Percent	100.0	100.0	100.0	100.0
Householder or spouse of householder	76.7	85.6	85.8	89.6
Child of householder	13.2	7.6	9.5	6.6
Nonrelative of householder	6.4	4.5	2.1	1.6
Other*	3.7	2.3	2.6	2.2

* Includes persons living with relatives other than parents or group quarters, other than school dormitories. The latter are included in "child of householder".

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 399

The Elderly

Since 1970, there has been more change in the living arrangements of the non-institutional population aged 75 and over (older elderly) than for those age 65 to 74 years. In 1970, 64% of the older elderly people lived in families (i.e., with relatives); by 1983 this declined to 59%.

Living Arrangements of the Elderly: 1970, 1983

	1983		1970	
	65 to 74 Years	74 Years & Over	65 to 74 Years	75 Years & Over
Total persons (thousands)	15,981	9,756	12,093	6,968
Percent	100.0	100.0	100.0	100.0
In families	72.4	58.9	73.3	64.3
Householder	40.0	32.9	39.7	34.5
Married, spouse present	34.2	25.3	33.2	24.9
Other	5.7	7.6	6.5	9.6
Spouse of householder	27.4	15.2	24.7	12.2
Other relative	5.1	10.8	8.9	7.4
Not in families	27.6	41.1	26.7	35.7
Living alone	25.6	38.6	23.3	32.4

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 389

SCHOOL ENROLLMENT

In October 1984, the latest period for which figures have been published by the Census Bureau, total school enrollment for those age three and over was 58.8 million. Enrollment in the nation's elementary and high schools was significantly lower in 1984 than in 1980, while enrollment at the college level was higher.

Elementary school enrollment in 1984 was 26.8 million, 1.4 million fewer than in 1980 and 7.1 million below the peak year of 1970. More than one million fewer high school students were enrolled in 1984 than in 1980, 13.8 million as against 14.9 million. Enrollment in 1984 was about 2 million below the peak years of 1976 and 1977.

This decline in elementary and high school enrollment is, in large part, a function of the downturn in births after the peak baby boom years and the aging of the baby boomers past school age. The echo baby boom beginning in the late 1970's, as baby boomers have children of their own, is now reflected in the growth of nursery school enrollment. This impact should manifest itself in a gain in elementary school enrollment in the next few years.

The increase in nursery school enrollment, from 2.0 million in 1980 to 2.4 million in 1984, was also due to the growth in the number of working mothers who found it desirable to enroll their children in nursery schools or day care centers. In each year since 1980, about 36% of those children aged 3-4 were enrolled in school.

College enrollment totaled 12.3 million in 1984, higher than the 1980 enrollment of 11.7 million. However, much of this growth came at the beginning of the decade and the population of those aged 18-19 had declined since 1981. Women comprised 51% of college students. Students 25 years and over accounted for 36% of all college students.

School Enrollment: 1980, 1984
(Based on civilian noninstitutional population)

	1984		1980		
	Number (thous.)	% of Total	Number (thous.)	% of Total	% Change 1984/1980
Total enrolled	58,757	100.0%	60,167	100.0%	- 2.3%
Nursery school	2,354	4.0	2,031	3.4	+15.9
Kindergarten	3,484	5.9	3,272	5.4	+ 6.5
Elementary school	26,838	45.7	28,241	46.9	- 5.0
High School	13,777	23.4	14,935	24.8	- 7.8
College	12,304	20.9	11,688	19.4	+ 5.3

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 404

Nearly 48% of the U.S. civilian population aged 3 to 34 was enrolled in school in 1984. This figure, which covers enrollment ranging from nursery school through college, is down from 49.7% in 1980 and 56.4% in 1970. As noted, most of this decline is now to be found at the elementary through high school levels, corresponding to ages 5 to 17.

SCHOOL ENROLLMENT

Percentage of Persons 3 to 34 Years Old Enrolled in School, By Age & Sex: 1980, 1984

	1984			1980		
	Total	Male	Female	Total	Male	Female
Total, 3 to 34 years	47.9%	49.1%	46.6%	49.7%	50.9%	48.5%
3 and 4 years	36.3	35.9	36.7	36.7	37.8	35.5
5 and 6 years	94.5	94.0	95.1	95.7	95.0	96.4
7 to 13 years	99.2	99.1	99.4	99.3	99.2	99.3
14 to 17 years	94.7	94.7	94.7	93.4	93.7	93.1
18 and 19 years	50.1	52.4	48.0	46.4	47.0	45.8
20 and 21 years	33.9	36.2	31.7	31.0	32.6	29.5
22 to 24 years	17.3	20.1	14.6	16.3	17.8	14.9
25 to 29 years	9.1	9.6	8.6	9.3	9.8	8.8
30 to 34 years	6.3	5.8	6.7	6.4	5.9	7.0

Source: U.S. Bureau of the Census, Current Population Reports, Series P-20, No. 404

EDUCATIONAL ATTAINMENT

As of March 1984, 73% of adults 25 years and over in the U.S. had graduated from high school. In 1970, just 55% of those of this age had completed high school. Nearly 87% of 25-34 year olds in 1984 were high school graduates, compared with nearly 48% of those aged 65 years and over.

Of those aged 25 years and over in 1984, 35% had one or more years of college completed and 19% were college graduates. In 1984, 23% of men and 16% of women 25 years and over were college graduates.

Years of School Completed by Persons 25 Years Old and Over, Percent by Age, 1984

	4 Years of High School or More	4 Years of College Or More
Both sexes, 25 years & over	73.0%	19.0%
25 to 34 years	86.5	24.3
35 to 44 years	83.3	25.3
45 to 54 years	74.0	17.6
55 to 64 years	65.5	14.1
65 and over	47.7	9.4

Source: U.S. Bureau of the Census, Current Population Reports, Series P-23, No. 145

LABOR FORCE, EMPLOYMENT & EARNINGS

Labor Force Profile

The total U.S. labor force, consisting of those presently employed and those actively seeking work, averaged 117.2 million workers during 1985. This figure, which includes resident Armed Forces, represents an annual gain of 1.7%, based on the labor force of 115.2 million reported for 1984. This increase is nearly identical to the 1.8% rise in employment during 1984.

(continued)

LABOR FORCE, EMPLOYMENT & EARNINGS

Labor Force Profile

Civilian employment during 1985 rose to 107.2 million, a gain of 2.1 million jobs for the year. This increase of 2.0% falls short of the 4.1% increase recorded for 1984. Nevertheless, both total and civilian employment achieved record highs during 1985. In addition, a record total of 64.8% of the civilian population 16 years and over were employed, higher than even the peak of World War II.

Labor Force Profile: 1980, 1983-1985
(Thousands of persons 16 years of age & over in U.S.)

	Annual Average			
	1985	1984	1983	1980
Total noninstitutional population	179,912	178,080	175,891	169,349
16 years of age & older	117,167	115,241	113,226	108,544
Total labor force	65.1%	64.7%	64.4%	64.1%
% of population	108,856	106,702	102,510	100,907
Employed, total	1,706	1,697	1,676	1,604
Resident Armed Forces	107,150	105,005	100,834	99,303
Civilian employed	103,971	101,685	97,450	95,938
Nonagricultural inds.	3,179	3,321	3,383	3,364
Agriculture	8,312	8,539	10,717	7,637
Unemployed	7.1%	7.4%	9.5%	7.0%
% of total labor force	7.2%	7.5%	9.6%	7.1%

* Includes resident Armed Forces.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings (January 1986).

The growth of the civilian labor force to its record 1985 level represents an approximately 50% increase in new workers over the past 20 years in the U.S. This relfects two key changes in the composition of the labor force during this period: the impact of the baby boomers and the influx or working women.

The 77 million babies born between 1946 and 1964 came of working age between 1965 and 1983. Over the next decade, they will reach those ages at which labor force participation rates are the highest. Conversely, the markedly lower birth rates beginning in the mid-1960's has led to fewer persons reaching the age of labor force entry in the 1980's.

About 51.1 million women were in the labor force in 1985, an increase of 2.7% from a year earlier. This increase was somewhat higher than the annual gains of recent years, but down from the 4-5% annual gains during much of the 1970's. Today, about three-quarters of women aged 25-34 are in the work force, in comparison to 15 years ago when just 45% of women in this age group even looked for paid work. There has been an increase of more than 12 million women of all ages to the labor force over the past decade.

Labor Force Profile (continued)

Growth in the Civilian Labor Force, 1980-1985
(Thousands of persons 16 years of age & older)

		Civilian Labor Force				
					Unemployed	
Year	Civilian Noninstitutional Population	Total	% of Population	Employed	Number	% of Labor Force
TOTAL						
1980	167,745	106,940	63.8%	99,903	7,637	7.1%
1981	170,130	108,670	63.9	100,397	8,273	7.6
1982	172,271	110,204	64.0	99,526	10,678	9.7
1983	174,215	111,550	64.0	100,834	10,717	9.6
1984	176,383	113,544	64.0	105,005	8,539	7.5
1985	178,206	115,461	64.8	197,150	8,312	7.2
MEN						
1980	79,398	61,453	77.4%	57,186	4,267	6.9
1981	80,511	61,974	77.0	57,397	4,577	7.4
1982	81,523	62,450	76.6	56,271	6,179	9.9
1983	82,531	63,047	76.4	56,787	6,260	9.9
1984	83,605	63,835	76.4	59,091	4,744	7.4
1985	84,469	64,411	76.3	59,891	4,521	7.0
WOMEN						
1980	88,348	45,487	51.5%	42,117	3,370	7.4
1981	89,618	46,696	52.1	43,000	3,696	7.9
1982	90,748	47,755	52.6	43,256	4,499	9.4
1983	91,684	48,503	52.9	44,047	4,457	9.2
1984	92,778	49,706	53.6	45,915	3,794	7.6
1985	93,736	51,050	54.5	47,259	3,791	7.4

Source: U.S. Bureau of Labor Statistics, Employment & Earnings (January 1986 issue)

The labor force is projected to reach 122.7 million persons in 1990 and 129.2 million by 1995, according to new Bureau of Labor Statistics projections. These projections are predicted by strong productivity and investment growth, a declining unemployment rate, and a real annual rate of growth in gross national product of 2.9% between 1984 and 1985.

Based on these "moderate growth" assumptions (the BLS has also formulated a high growth and a low growth set of projections), the labor force is expected to grow at a slower rate over the 1984-1985 period than noted over the 1975-1984 period, with the slowest growth occurring during the early 1990's.

Women are expected to account for 60% of labor force growth from 1984-1995. By 1995, 80% of women ages 25-44 will be working, up from 70% in 1984 and 50% in 1970. The continuing increases reflect changes in educational attainment, marital status, rising career aspirations and fertility.

The aging of the baby boom generation and the projected continued decline in labor force participation of older persons is expected to result in a 1995 labor force with nearly 75% of the total in the prime working ages of 25-54 years, (up from 66% in 1984). Participation among persons ages 55 and over is expected to be only 25% in 1995 (down from 30% in 1984), reflecting increasing percentages of workers who are eligible for pensions and who select early retirement. This decrease, combined with a decline in the number of younger workers as well, will limit the growth of the labor force to 15 million workers over the 1984-1995 period, despite a projected increase of 21 million in the prime working ages of 25-54.

Labor Force Profile (continued)

Civilian Labor Force, by Sex, Age, & Race: Actual 1984 & Projections to 1995

	Labor Force (in thousands)			Average Annual Rate of Change	
	1984	1990	1995	1984-1990	1990-1995
Total labor force, 16 years & over	113,544	122,653	129,168	1.3%	1.0%
Men, 16 & over	63,835	67,146	69,282	0.8	0.6
16 to 24	12,727	11,163	10,540	-2.2	-1.1
25 to 54	42,302	48,079	51,200	2.2	1.3
55 & over	8,805	7,904	7,542	-1.8	-0.9
Women, 16 & over	49,704	55,507	59,886	1.9	1.5
16 to 24	11,260	10,089	9,623	-1.8	-0.9
25 to 54	32,360	39,632	44,519	3.4	2.4
55 & over	6,084	5,786	5,744	-0.8	-0.1
White	98,492	105,467	110,086	1.1	0.9
Black	12,033	13,602	14,796	2.1	1.7

Source: U.S. Bureau of Labor Statistics, Monthly Labor Review, (November 1985)

Employment Status

During 1985, about three million jobs were added to nonfarm payrolls, according to the Labor Department. The service industries accounted for more than 40% of this growth.

There was a decline of 180,000 manufacturing jobs in 1985, despite three consecutive months of moderate growth at the end of the year. Retail trade was up 640,000, with strong growth in eating and drinking places and food stores. Employment in construction grew by nearly 300,000, attributable in large part to the housing boom.

Average unemployment during 1985 fell to 7.1% of the labor force from 7.4% in 1984. This represents the lowest level since the 7.1% rate in 1980. The December 1985 rate of 6.8% was the lowest since the start of the Reagan Administration. This strong year-end finish has the Administration forecasting a 6.7% average unemployment rate for 1986.

The civilian labor force consisted of 99.9 million White workers and 12.4 million Black workers, 86.5% and 10.7%, respectively, of the total in 1985. The unemployment rate for Whites that year was 6.2%, down from the 6.5% rate in 1984. The unemployment rate for Blacks fell to 15.1% from the 15.9% rate the year before.

A March 1985 report by the U.S. Census Bureau places the number of Hispanics age 16 years and over in the U.S. at 11.5 million, with 7.4 million in the labor force, a participation rate of 64.2%. There were 6.5 million Hispanics employed at that time, resulting in an unemployment rate of 11.3%.

(continued)

Employment Status (continued)

Total Employment in Civilian Occupations by Sex, 1980-1985
(Persons 16 years of age & over)

Year	Total Number (000)	Percent	Percent By Sex Men	Percent By Sex Women
1980	99,303	100.0%	57.6%	42.4%
1981	100,397	100.0	57.2	42.8
1982	99,526	100.0	56.5	43.5
1983	100,834	100.0	56.3	43.7
1984	105,005	100.0	56.2	43.8
1985	107,150	100.0	55.9	44.1

Source: Based on U.S. Bureau of Labor Statistics reports.

The number of women working full-time increased to 66.5% of all women in the civilian labor force in 1985, up from 66.0 in 1984. Another 11.6% are seeking full-time work. The unemployment rate for women seeking full-time work declined from 5.9% to 5.6% in 1985.

The number of women in the civilian labor force increased to 51.1 million in 1985, 54.5% of all women in the civilian noninstitutional population 16 years and over. This is up from the 53.6% figure for 1984. This gain is apparent in every age grouping. The number of men in the civilian labor force rose to 64.4 million in 1985, from 63.8 million in 1984.

Full- & Part-Time Status of Civilian Employees, 1984, 1985
(Age 16 & over. Numbers in thousands)

	Men				Women			
	Number		Percent		Number		Percent	
	1985	1984	1985	1984	1985	1984	1985	1984
Civilian labor force total	64,411	63,835	100.0	100.0	51,050	49,709	100.0	100.0
Full-time labor force	59,329	58,837	92.1	92.2	39,849	38,795	78.1	78.0
Employed								
Full-time	52,832	52,043	82.0	81.5	33,963	32,788	66.5	66.0
Part-time for economic reasons	2,572	2,652	4.0	4.2	3,018	3,091	5.9	6.2
Unemployed	3,925	4,142	6.1	6.5	2,868	2,916	5.6	5.9
Part-time labor force	5,082	4,998	7.9	7.8	11,201	10,914	21.9	22.0
Employed part-time voluntarily	4,486	4,396	7.0	6.9	10,278	10,035	20.1	20.2
Unemployed	596	602	0.9	0.9	923	879	1.8	1.8

Source: U.S. Bureau of Labor Statistics, Employment & Earnings (January 1986)

ployment Status (continued)

The composition of the work force by age is changing for both sexes. The aging of the baby boomers has played a significant role in the growing proportion of the labor force that is 25 to 44 years old. In 1985, 52.3% of the men who were employed fell into this age group, in contrast with the 48.2% in 1981. In 1985, a reported 52.0% of employed women were in this bracket, up from 47.5% in 1981. These gains come at the expense of the other age groups, both young and old, which had declining shares of total employment.

Employment Status of the Civilian Noninstitutional Population By Sex & Age, 1985

(Numbers in millions)

		Civilian Labor Force					
					Unemployed		Number Not in Labor Force
	Number In Population	Total Number	% of Population	Number Employed	Number	% of Labor Force	
MEN							
16 years & over	84.5	64.4	76.3%	59.9	4.5	7.0%	20.1
16 to 19	7.3	4.1	56.8	3.3	0.8	19.5	3.1
20 to 24	9.7	8.3	85.0	7.3	0.9	11.4	1.5
25 to 54	46.0	43.2	93.9	40.8	2.4	5.6	2.8
25 to 34	19.9	18.8	94.7	17.6	1.2	6.6	1.1
35 to 44	15.3	14.5	95.0	13.8	0.7	4.9	0.8
45 to 54	10.8	9.9	91.0	9.4	0.5	4.6	1.0
55 to 64	10.4	7.1	67.9	6.8	0.3	4.3	3.3
65 & over	11.1	1.8	15.8	1.7	*	3.1	9.3
WOMEN							
16 years & over	93.7	51.1	54.5%	47.3	3.8	7.4%	42.7
16 to 19	7.2	3.8	52.1	3.1	0.7	17.6	3.5
20 to 24	10.4	7.4	71.8	6.6	0.8	10.7	2.9
25 to 54	48.5	33.8	69.6	31.7	2.1	6.2	14.7
25 to 34	20.8	14.7	70.9	13.6	1.1	7.4	6.1
35 to 44	16.1	11.6	71.8	10.9	0.6	5.5	4.5
45 to 54	11.6	7.5	64.4	7.1	0.4	4.8	4.1
55 to 64	11.7	4.9	42.0	4.7	0.2	4.3	6.8
65 & over	15.9	1.2	7.3	1.1	*	3.3	14.8

* Under 100,000

Source: U.S. Bureau of Labor Statistics, Employment & Earnings, (January 1986)

Consumer Employment by Sex & Age, 1983 - 1985

(% of civilian employees age 16 & older)

	Men			Women		
	1985	1984	1983	1985	1984	1983
Civilian employees, 16 & older, total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Age: 16 to 19 years	5.6	5.6	5.8	6.6	6.8	6.9
20 to 24	12.3	12.8	12.7	14.1	14.4	14.7
25 to 34	29.3	29.0	28.6	28.9	28.7	28.5
35 to 44	23.0	22.5	21.9	23.1	22.4	21.6
45 to 54	15.7	15.8	16.1	15.0	14.9	15.2
55 to 64	11.3	11.3	11.8	10.0	10.2	10.5
65 & over	2.8	2.9	3.1	2.4	2.5	2.6

Source: Based on U.S. Bureau of Labor Statistics Reports.

Employment Status

The total number of families with employed members averaged 50.4 million in 1985, 80.7% of all families. In 1984, there were 49.9 million families with employed members, 80.6% of the total.

An average 41.6 million married-couple families had at least one employed member in 1985, up 232,000 from the year before. Both husband and wife were employed in 22.6 million of these families (54.2%). The proliferation of two-income families, with the increasing proportion of women in the work force, is providing households with more discretionary income than they ever had before. Employment also increased substantially for families led by non-married women.

Employed Status of Families, 1984, 1985

	Number (000)	Percent	
	1985	1985	1984
Married-couple families	49,991	100.0%	100.0%
With no members in the labor force	7,466	14.9	14.8
With at least one member in the labor force	42,526	85.1	85.2
No member employed	920	1.8	2.0
Some member employed	41,606	83.2	83.2
Husband only	12,274	24.6	25.5
Wife only	2,368	4.7	4.7
Husband and wife	22,550	45.1	44.1
Husband and wife only	17,761	35.5	34.7
Other combinations	4,414	8.8	8.9
Families maintained by women	10,122	100.0	100.0
With no members in the labor force	2,484	24.5	24.9
With at least one member in the labor force	7,638	75.5	75.1
No member employed	801	7.9	7.9
Some member employed	6,837	67.5	67.2
Householder employed	5,540	54.7	54.5
Householder only	3,463	34.2	34.5
Householder and other(s)	2,077	20.5	20.1
Other combinations	1,287	12.8	12.7
Families maintained by men	2,395	100.0	100.0
With no members in the labor force	281	11.7	12.1
With at least one member in the labor force	2,114	88.3	87.9
No member employed	144	6.0	5.9
Some member employed	1,970	82.3	82.0
Householder employed	1,680	70.1	69.3
Householder only	913	38.1	36.7
Householder and other(s)	767	32.0	32.6
Other combinations	290	12.1	12.6

Source: Based on U.S. Bureau of Labor Statistics Reports.

LABOR FORCE, EMPLOYMENT & EARNINGS

Employment Status

The total number of mothers in the labor force with children under the age of 6 rose by nearly 200,000 over the year to reach 8.2 million in March 1985. Half of all mothers of children under 3 were in the labor force, up from one-third in 1975. For those whose youngest child was 3-5, about 60% were in the labor force, up from 45% in 1975. The total number of mothers in the labor force with children under 18 rose by nearly 500,000 over the year to a total of 20 million.

The vast majority of working mothers work full-time. Those with children under 3 are least likely (67%) and those whose youngest child was 14-17 years of age are most likely to work full-time (77%). Divorced mothers are more likely than mothers in any other marital status category to work full-time.

Employment Status of Mothers by Age of Children, March 1985
(Numbers in thousands)

	Civilian Noninstitutional Population	Civilian Labor Force				
				Employed		
		Total	% of Population	Total	% Full-time	% Part-time
All mothers	32,295	20,041	62.1	18,306	71.3	28.7
With children 6-17	16,929	11,826	69.9	10,984	73.4	26.6
Children 14-17	5,556	3,880	69.8	3,683	77.2	22.8
Children 6-13	11,373	7,946	69.9	7,301	71.4	28.6
With children under 6	15,366	8,215	53.5	7,322	68.2	31.8
Children 3-5	6,072	3,613	59.5	3,234	69.6	30.3
Children under 3	9,294	4,601	49.5	4,089	67.0	33.0
Married mothers	24,566	14,932	60.8	13,949	68.0	32.0
With children 6-17	12,577	8,526	67.8	8,054	69.7	30.3
Children 14-17	4,127	2,766	67.0	2,657	73.7	26.3
Children 6-13	8,450	5,760	68.2	5,397	67.7	32.3
With children under 6	11,989	6,406	53.4	5,895	65.7	34.3
Children 3-5	4,478	2,616	58.4	2,423	66.7	33.3
Children under 3	7,511	3,791	50.5	3,472	64.9	35.1

Source: U.S. Bureau of Labor Statistics Reports.

Occupations:

The following table, on occupation by sex, confirms the well-documented passage of women into managerial and professional positions over recent years. In 1985, 23.4% of employed women fell into this classification. Just three years ago, the comparable proportion was 21.7%. Over this period, men have maintained their share of these positions--in 1985, 24.7% of employed men had managerial and professional positions as compared with 24.5% in 1982. The total number of working men grew 6.4% from 1982 to 1985, resulting in 59.9 million workers, 14.8 million managerial/professional. During the same period, the total number of working women grew 9.3% to 47.3 million, with 11.1 million women in managerial/professional positions.

Employment Status

Occupations: (continued)

Employed Civilians by Occupation & Industry, 1982, 1985
(Numbers in thousands)

Occupation	Total 1985	Total 1982	Men 1985	Men 1982	Women 1985	Women 1982
Total, 16 years & over (thous.)	107,150	99,526	59,891	56,271	47,259	43,256
Percent	100.0	100.0	100.0	100.0	100.0	100.0
Managerial & professional specialty	24.1	23.3	24.7	24.5	23.4	21.7
Executive, administrative, managerial	11.4	10.7	13.1	12.8	9.2	7.8
Professional specialty	12.7	12.6	11.6	11.6	14.2	13.9
Tech., sales & admin. support	31.0	30.9	19.6	19.5	45.5	45.7
Technicians & related support	3.0	3.0	2.9	2.9	3.3	3.2
Sales occupations	11.8	11.3	11.0	10.9	12.9	11.9
Admin. support incl. clerical	16.2	16.6	5.7	5.8	29.4	30.7
Service occupations	13.5	13.6	9.5	9.4	18.5	19.0
Precision production, craft, repair	12.4	11.9	20.4	19.4	2.4	1.9
Operators, fabricators, laborers	15.7	16.6	20.9	21.5	9.1	10.3
Farming, forestry, fishing	3.2	3.8	4.9	5.6	1.2	1.4
Industry						
Agriculture	3.0	3.4	4.2	4.9	1.4	1.5
Mining	0.9	1.0	1.3	1.5	0.3	0.4
Construction	6.5	5.8	10.6	9.4	1.3	1.1
Manufacturing	19.5	20.4	23.6	24.4	14.3	15.2
Transportation	4.1	4.1	9.2	8.6	4.3	4.0
Wholesale trade	4.1	4.1	5.2	5.3	2.6	2.6
Retail trade	16.8	16.7	14.4	14.2	19.7	20.0
Finance, insurance, real estate	6.5	6.3	4.8	4.8	8.7	8.3
Services	31.1	30.4	21.6	21.1	43.1	42.4
Public administration	4.7	5.2	4.9	5.8	4.3	4.5

Source: U.S. Bureau of Labor Statistics, Employment & Earnings (January 1986)

Over the next decade, computer-related occupations are projected to have the fastest rate of growth. Estimates by the Bureau of Labor Statistics forecast a 71.7% leap in the number of computer programmers from 1984 to 1995. Other fast growing professions are expected to be computer systems analysts (68.7%), electrical and electronics engineers (52.8%), electrical and electronics technicians & technologists (50%) and computer operators (46.1%).

In absolute numbers, the occupations that are projected to have the most job growth over this period tend to be relatively low-paying. The number of cashiers is expected to grow by 556,000 to 2.5 million (a 29.8% gain). Other occupations projected to have a large numerical gain through 1995 are registered nurses, janitors/cleaners, truck drivers and waiters/waitresses.

Earnings

The median weekly earnings of all full-time wage & salary workers rose to $343 in 1985, up $17 a week from the year before. Working men saw their pay rise from $391 to $406 and working women gained from $265 to $277.

Though working women still have a way to go before they earn as much as men, the recent increases for women working full-time have been significantly higher than those for men throughout the 1980's. Over the past year, for example, working women in the 35-44 age group earned 5.5% more, while working men, by contrast, earned just 3.2% more. For all age groups, pay for women rose 4.5% and pay for men rose 3.8%.

The gap in earnings between Black and White workers grew wider in 1985. The median weekly pay for White workers increased 5.7% over the year to $355, while Black workers saw their pay rise just 3.0% to $277.

Median Weekly Earnings of Full-Time Wage & Salary Workers By Sex, Age & Race, 1984, 1985

	Total		Men		Women	
	1985	1984	1985	1984	1985	1984
Total, 16 years & over	$343	$326	$406	$391	$277	$265
16 to 24 years	223	217	240	231	210	203
25 years & over	378	361	442	422	296	282
25 to 34	349	335	393	382	295	284
35 to 44	405	389	486	471	307	291
45 to 54	400	385	488	469	291	278
55 to 64	380	365	467	439	284	269
65 years & over	296	271	367	327	242	218
Race & Hispanic Origin						
16 years & over						
White	$355	$336	$417	$400	$281	$268
Black	277	269	304	302	252	241
Hispanic origin	269	na	295	na	229	na

na not available

Note: Data refer to the sole or principal job of full-time workers, not including self-employed.

Source: U.S. Bureau of Labor Statistics, Employment & Earnings (January 1986)

Earnings

Median Weekly Earnings of Full-Time Wage & Salary Workers By Occupation & By Industry, 1984, 1985

Occupation	1985	1984
Managerial & professional specialty	$488	$468
Executive, administrative, managerial	497	483
Professional specialty	481	455
Technical, sales, administrative support	307	295
Technicians & related support	398	379
Sales occupations	335	319
Administrative support, including clerical	286	275
Service occupations	216	212
Precision production, craft, repari	397	384
Operators, fabricators, laborers	295	287
Farming, forestry, fishing	212	203
Industry		
Agricultural wage & salary workers	211	204
Private nonagricultural wage & salary workers	332	319
Mining	501	492
Construction	369	353
Manufacturing	368	348
Transportation	425	413
Communications & public utilities	484	463
Wholesale trade	368	341
Retail trade	243	234
Finance, insurance, real estate	334	316
Services	298	286
Government	394	375

(See note on preceding table)

Source: U.S. Bureau of Labor Statistics, Employment & Earnings (January 1986)

INCOME

Personal Income Profile

Total personal income in the U.S. in 1985 reached $3,293.4 billion, which was 5.8% greater than in 1984. this compares with a gain of 9.7% in 1984 compared with 1983. Disposable personal income on a current dollar basis registered an increase of 4.9% in 1985 compared with 1984. On a constant (1982) dollar basis, eliminating the effects of inflation, the rise was only 1.7%. In 1984, disposable personal income (current dollar basis) rose 10.1% over the 1983 level, and went up 5.7% in constant dollars.

Wages and salaries represented 59.5% of total personal income in 1985, about the same as in the previous year, but less than reported for 1983 and 1982. Interest income represented 13.8% of the 1985 total; dividends, 2.4%. Comparable figures for 1984 were 14.2% and 2.4%, respectively.

According to an analysis of the economic and financial outlook for 1986 compiled by Manufacturers Hanover Bank, the momentum that the economy developed toward the end of 1985 is expected to help throughout 1986. An increase of 6.2% was projected for 1986 in total personal income; and a 5.8% rise in disposable personal income. While lower inflation will increase disposable income, the question remains whether consumers will reverse the 1985 pattern, save more, spend less of their incomes. Household wealth has been boosted dramatically, however, by the recent boom in the stock market, and this reduces the incentive to save.

Personal Income & Outlays, 1983-1985
(billions of dollars)

	1985	1984(r)	1983(r)	% Change 1985/1984
Personal income	$3,293.4	$3,111.9	$2,834.9	+ 5.8%
Wages & salaries	1,960.5	1,834.9	1,675.8	+ 6.8
Other labor income*	206.4	193.4	179.5	+ 6.7
Proprietors' income	242.3	233.7	192.3	+ 3.7
Rental income	14.0	10.8	12.8	+29.6
Personal dividend income	78.9	74.6	68.0	+ 5.8
Personal interest income	456.0	442.2	385.7	+ 3.1
Transfer payments (old-age, disability, health insurance benefits, unemployment insurance benefits, etc.)	484.5	454.7	442.2	+ 6.5
Less Personal contributions for social insurance	149.1	132.4	119.8	+12.6
Less Personal tax & nontax payments	492.7	441.8	411.1	+11.5
Equals: Disposable personal income	2,800.7	2,670.2	2,425.4	+ 4.9
Less: Personal outlays**	2,671.6	2,497.7	2,292.2	+ 7.0
Equals: Personal saving	129.1	172.5	133.2	-25.2

(continued)

Personal Income Profile

Personal Income & Outlays, 1983-1985
(billions of dollars)
(continued)

	1985	1984(r)	1983(r)	% Change 1985/1984
Addenda:				
Disposable personal income in constant 1982 dollars (billions)	$ 2,508.8	$ 2,468.4	$ 2,334.6	+ 1.6
Per capita (current $)	11,703	11,279	10,339	+ 3.8
Per capita (1972 $)	10,484	10,427	9,952	+ 0.5
Population (mid period) (millions)	239.4	236.7	234.6	+ 1.1
Personal saving as a % of disposable personal income	4.6	6.5	5.5	--

(r) revised

* Employer contributions to private pension, health and welfare funds; workmen's compensation; directors' fees and a few minor items.

**Includes personal consumption expenditures, interest paid by consumers to business, not personal transfer payments to foreigners.

Source: U.S. Department of Commerce, Bureau of Economic Analysis

Included in the Census Bureau data on personal income are some $150 billion in unreported income from legal sources, which are variously estimated at representing from one-half to three-fourths of the underground economy. The balance consists of income from illegal activities which cannot be traced.

On a per capita basis, current dollars, disposable personal income in 1985 amounted to $11,703, up 3.8% compared with 1984. (In terms of constant dollar, the gain was less than 1.0%.)

Savings

From 1972-1974, Americans saved an average of 7.4% of their annual after-tax incomes. In 1985 the rate sank to only 4.6, down from 6.5 in 1984, and compared with 5.5 in 1983. As of December 1985, the annual savings rate was reported at only 3.9; and the Manufacturers Hanover Economic Report projects the 1986 rate to average about 3.9 for the year. Tax policies have apparently not worked to encourage savings as hoped. A cut-back in corporate contributions to private pension plans (which are counted as deferred personal income that is saved) has also affected the savings rate. The surge in stock prices has also made many people (stockholders) more secure, and may lead them to save less.

Money Income of Individuals

Each March, the U.S. Census Bureau conducts its Current Population Survey to develop information on personal, family and household characteristics, including income. Following is information from the March 1985 survey which covered 1984 income.

INCOME

Money Income of Individuals

In 1984, 94.4% of males and 89.8% of females age 15 and over had their own income. The median for males was $15,600, which was 6.9% above the 1983 median. For females with income in 1984, the median fell at $6,868, which was 9.0% higher than in 1983. Although females age 15 and over who had their own income in 1984 outnumbered males of this age who had income, the aggregate total income for females was less--$820 million for females vs. $1,597.5 billion for males, but the gap is narrowing.

The following data covers median income in terms of sex, age, region, and other characteristics of individuals with income.

Persons 15 Years of Age & Over With Income in 1984 & Median Income, 1984, 1983
(Selected Characteristics)

	Males			Females		
	Number With Income 1984 (thous.)	Median Income 1984	Median Income 1983	Number With Income 1984 (thous.)	Median Income 1984	Median Income 1983
Total	82,183	$15,600	$14,590	85,555	$6,868	$6,303
Race:						
White	72,162	16,467	15,359	73,977	6,949	6,403
Black	7,851	9,448	8,989	9,460	6,164	5,542
Spanish origin	5,174	11,101	10,841	4,617	5,830	5,371
Region:						
Northeast	17,285	16,666	15,468	18,967	7,003	6,370
Midwest	20,729	15,689	14,915	21,609	6,527	5,961
South	27,645	14,209	13,328	28,516	6,694	6,153
West	16,525	16,915	15,409	16,462	7,569	6,926
Living arrangements:						
In families	68,518	16,022	14,945	68,890	6,169	5,639
In unrelated subfamiles	215	6,965	6,944	431	6,102	6,148
Unrelated individuals	13,450	13,927	13,151	16,234	9,701	9,117
Occupation (based on longest job)						
Total with earnings	66,454	17,026	16,062	55,226	8,675	8,213
Executive, admin., mgr.	8,174	29,980	28,026	4,616	16,093	15,507
Professional specialty	7,152	28,363	26,071	7,400	16,108	15,207
Technical, related support	1,860	23,150	21,669	1,664	14,261	13,208
Sales	6,967	18,208	17,459	7,354	5,212	4,751
Admin., clerical	3,823	17,296	16,133	15,574	10,870	10,431
Precision prod., craft	13,345	18,299	15,074	1,266	10,606	9,329
Machine operators, etc.	5,116	15,929	15,074	4,012	8,674	8,310
Transportation, material moving	4,604	15,751	14,932	448	6,428	5,514
Handlers, laborers, etc.	4,560	7,019	6,677	983	5,963	5,688
Service workers	7,031	7,507	7,356	11,178	3,833	3,781
Farming, forestry, fishing	3,655	3,544	4,255	709	1,788	1,592

Source: U.S. Bureau of the Census, Current Population Reports
(Series P-60, No. 149)

INCOME

Money Income of Individuals

In terms of age, the highest median income for men in 1984 was in the 45-54 age group; for women, it was among those age 35 to 44 years. However, the greatest number of men and of women with incomes of $30,000 or more were 35 to 44 years of age--the earliest of the baby-boom crop (1946-1964).

Number & Percent of Men & Women Age 15 Years & Over By Total Money Income, 1984

(numbers in thousands)

		Age Groups (years)						
	Total	15-19	20-24	25-34	35-44	45-54	55-64	65 & over
MALES, total	87,034	9,222	10,055	20,184	15,333	10,848	10,377	11,014
With income	82,183	6,196	9,375	19,775	15,075	10,628	10,195	10,939
Under $10,000	27,770	5,881	5,526	4,494	2,293	1,842	2,511	5,220
$10,000-$19,999	21,973	273	2,939	6,566	3,420	2,363	2,700	3,710
$20,000-$29,999	15,440	27	755	5,188	3,918	2,404	2,084	1,065
$30,000 & over	17,000	15	155	3,527	5,444	4,019	2,900	944
Median income	$15,600	$1,893	$8,046	$18,093	$24,566	$24,589	$19,527	$10,450
Mean income	19,438	2,967	9,464	19,534	26,894	27,513	24,350	14,450
MALES, total, percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
With income	94.4	67.2	93.2	98.0	98.3	98.0	98.2	99.3
Under $10,000	31.9	63.8	55.0	22.3	14.9	17.0	24.2	47.4
$10,000-$19,999	25.2	3.0	29.2	32.5	22.3	21.8	26.0	33.7
$20,000-$29,999	17.7	0.3	7.5	25.7	25.5	22.2	20.1	9.7
$30,000 & over	19.5	0.2	1.5	17.5	35.5	37.0	27.9	8.6
FEMALES, total	95,282	9,103	10,411	20,674	15,966	11,550	11,774	15,804
With income	85,555	5,874	9,333	19,017	14,636	10,409	10,702	15,584
Under $10,000	53,644	5,668	6,691	9,873	7,529	5,580	6,769	11,539
$10,000-$19,999	21,251	187	2,328	6,252	4,107	3,051	2,517	2,807
$20,000-$29,999	7,598	16	259	2,302	2,127	1,192	914	789
$30,000 & over	3,062	3	55	590	873	586	502	449
Median income	$ 6,868	$1,719	$5,911	$ 9,392	$ 9,561	$ 8,903	$ 6,837	$ 6,020
Mean income	9,584	2,521	7,125	10,686	11,828	11,397	9,954	8,800
FEMALES, total, percent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
With income	89.8	64.5	89.4	91.9	91.7	90.1	90.9	98.6
Under $10,000	56.3	62.3	64.1	47.7	47.2	48.3	57.5	73.0
$10,000-$19,999	22.3	2.0	22.3	30.2	25.7	26.4	21.4	17.8
$20,000-$29,999	8.0	0.2	2.5	11.1	13.3	10.3	7.8	5.0
$30,000 & over	3.2	*	0.5	2.9	5.5	5.1	4.3	2.8

* Less than 0.1%

Source: U.S. Bureau of the Census, Current Population Reports (Series P-60, No. 149)

INCOME

Money Income of Individuals

Based on mean income reported by the Census Bureau, aggregate money income of individuals totaled $1,597.5 billion for men; $819.9 billion for women. Men age 25-44 years (42.4% of those 15 years of age or older with income in 1984) had half of the total aggregate income reported for males. Women in this age group (39.3% of the total with income) garnered a 45.9% share of the aggregate money income among women.

Estimated Aggregate Income of Individuals By Sex & Age, 1984
(Number in thousands; income in billions)

	Men				Women			
	Number	%	Number	%	Number	%	Income	%
Total, with income	82,183	100.0	$1,597.5	100.0	85,555	100.0	$819.9	100.0%
Age (years)								
15 - 19	6,196	7.5	18.4	1.1	5,874	6.9	14.8	1.8
20 - 24	9,375	11.4	88.7	5.6	9,333	10.9	66.5	8.1
25 - 34	19,775	24.1	386.3	24.2	19,017	22.2	203.2	24.8
35 - 44	15,075	18.3	405.4	25.4	14,636	17.1	173.1	21.1
45 - 54	10,628	13.0	292.4	18.3	10,409	12.2	118.6	14.5
55 - 64	10,195	12.4	248.3	15.5	10,702	12.5	106.5	13.0
65 & over	10,939	13.3	158.0	9.9	15,584	18.2	137.2	16.7

Source: Based on U.S. Bureau of the Census reports.

Most men with money income of $30,000 or more in 1984 were concentrated in the $35,000-$49,999 income bracket (42%), while most women (42.9%) were in the $30,000-$34,999 bracket.

The Population 15 Years of Age & Older
With Incomes of $30,000 Or More in 1984

	Men		Women	
	Number (000)	Percent	Number (000)	Percent
Total	17,000	100.0	3,062	100.0
Income: $30,000-$34,999	5,396	31.7	1,316	42.9
$35,000-$49,000	7,141	42.0	1,193	39.0
$50,000-$74,999	2,989	17.6	397	13.0
$75,000 & over	1,474	8.7	156	5.1

Source: U.S. Bureau of the Census, Current Population Reports (Series P-60, No. 149)

INCOME

Household/Family Income

At the end of 1985, the Congressional Joint Economic Committee reported that real income of most families has retreated significantly during the last 11 years--particularly since 1979. The 1980's were ushered in during a period of sharp inflation. Earnings did not keep up, and on a constant dollar basis median household incomes were about 5% below the 1979 level. Only elderly householders were doing better in 1984 than in 1979, largely due to the fact that Social Security payments were indexed. Among the youngest householders, those under age 25, median incomes dropped by 18%.

To make out, more families need two incomes. By 1985, 42% of the Nation's families had two earners; 14% had three or more. The median income of two-earner families was 56% greater than that of one-earner families compared with a 45% spread in 1949. However, after adjusting for inflation, the median income of two-earner families was still below the 1979 level by 2%; for one-earner families, it was down 9%.

The JEC found that families with children are being hit the hardest by the decline in real income. A family with children living at the middle income level was said to have lost income at an annual rate of almost $300 over each of the last 11 years. This occurred even though the number of workers in households with children has risen 20%.

Income continues to be concentrated among fewer households. In 1984, the top fifth of all families (20%) had a 42.9% share of aggregate income; the top fifth of unrelated individuals had a 48.1% share of aggregate income for this group. Overall, the top fifth of U.S. households held a 45.2% share of income in 1984 compared with 43.7% in 1975.

Percent Distribution of Aggregate Income, 1984

	Top 5%	Highest Fifth	Fourth Fifth	Third Fifth	Second Fifth	Lowest Fifth
Families	16.0	42.9	24.4	17.0	11.0	4.7
Unrelated individuals	19.1	48.1	24.1	15.2	8.9	3.8

Source: U.S. Bureau of the Census, Current Population Reports (Series P-60, No. 149)

Further details on characteristics of households by total money income are noted in the following table.

INCOME

Household/Family Income

Selected Characteristics of Households By Total Money Income, 1984

	Households		Households with Income of $40,000 or More		All Households	
	Number (thous)	Percent	Number	Percent	Median Income	Mean Income
All households as of March 1985	86,789	100.0	18,898	100.0	$22,415	$27,464
Income:						
Under $15,000	28,912	33.3	--	--	--	--
$15,000-$24,999	18,883	21.7	--	--	--	--
$25,000-$34,999	14,664	16.9	--	--	--	--
$35,000-$49,999	13,248	15.3	--	--	--	--
$50,000-$74,999	7,824	9.0	--	--	--	--
$75,000 & over	3,256	3.7	--	--	--	--
Region:						
Northeast	18,348	21.1	4,492	23.8	23,550	28,645
Midwest	21,697	25.0	4,364	23.1	22,586	26,612
South	29,581	34.1	5,812	30.7	20,623	26,203
West	17,163	19.8	4,230	22.4	24,457	29,450
Race:						
White	75,328	86.8	17,433	92.2	23,647	28,597
Black	9,480	10.9	943	5.0	13,471	17,966
Spanish origin (any race)	4,883	5.6	600	3.2	16,992	21,129
Age of householder:						
15 - 24 years	5,438	6.3	260	1.4	14,028	16,644
25 - 34 years	20,013	23.0	3,548	18.8	23,735	26,178
35 - 44 years	17,481	20.1	5,465	28.9	29,784	33,389
45 - 54 years	12,628	14.6	4,637	24.5	31,516	36,003
55 - 64 years	13,073	15.1	3,394	18.0	24,094	30,516
65 & over	18,155	20.9	1,594	8.4	12,799	18,279
Selected Household Sizes:						
One person	20,602	23.7	1,084	5.7	11,512	15,327
Two person	27,389	31.5	5,705	30.2	22,614	27,873
Tenure						
Owner occupied	55,845	64.3	16,002	84.7	27,282	32,055
Renter occupied	29,369	33.8	2,795	14.8	15,719	19,355
Occupier paid no rent	1,575	1.8	101	0.5	11,781	15,881

Source: U.S. Bureau of the Census, Current Population Reports (Series P-60, No. 149)

Family households numbered 62,706,000 in the March 1985 Survey, representing 72.2% of the household total count. Median income for families in 1984 amounted to $26,433 in terms of current dollars, compared with $24,549 in 1983; $21,023 in 1980; $13,719 in 1975. In terms of constant (1984) dollars, median family income in 1980 amounted to $26,500 and $26,476 in 1975.

INCOME

Household/Family Income

Summary of Median Income Levels By Type of Family, 1983, 1984

	1984		1983	% Change (Median Income)	
	Number (thous.)	Median Income $	Median Income $	In current dollars	In 1984 dollars
All families, total	62,706	$26,433	$24,549	7.7	3.3
Region					
Northeast	13,149	28,487	26,636	6.9	2.6
Midwest	15,839	26,753	24,739	8.1	3.7
South	21,781	24,094	22,480	7.2	2.8
West	11,938	28,077	25,511	10.1	5.6
Type of family					
Married couple families	50,350	29,612	27,268	8.6	4.2
Wife in paid labor force	26,938	34,668	32,099	8.0	3.6
Wife not in paid labor force	23,412	23,582	21,871	7.8	3.4
Male householder, wife not present	2,228	23,325	21,770	7.1	2.8
Female householder, no husband present	10,129	12,803	11,769	8.8	4.3
Number of earners					
No. of earners	9,221	11,377	10,391	9.5	5.0
One earner	17,949	20,291	19,359	4.8	0.5
Two earners	26,160	31,707	29,779	6.5	2.1
Three earners	6,029	39,828	37,270	6.9	2.5
Four earners or more	2,570	50,278	47,682	5.4	1.1

Source: U.S. Bureau of the Census, Current Population Reports
Series P-60, No. 149 (Advance Data From March 1985
Current Population Survey)

Discretionary Income

Some 26.5 million households--about one out of three households--have income above that required for a "comfortable" standard of living, according to a report published in December 1985 by the Census Bureau and the Conference Board's Consumer Research Center. This "discretionary" income, which is the amount of money households have after paying taxes and normal household expenses, amounts to about $280 billion (measured in 1984 dollars). It represents 16% of all household income after taxes, averaging about $10,530 per household, based on the Census Bureau's March 1983 Income Survey.

Major findings in the report were as follows:

The average income after taxes was $20,350 for all U.S. households, but $34,560 for those with discretionary income.
Household which earned $40,000 or more before taxes (about 20% of the total) controlled about 80% of all discretionary dollars, and accounted for more than half of all households with this income.
About 63% of all discretionary income was held by households with two or more earners.
The 50-year-old-and-over market held about one of every two discretionary dollars.
The baby-boom group (concentrated in the 25-to-39 age bracket) comprised about one-third of households but had only 27% of discretionary income.

(continued)

Discretionary Income (continued)

Households With Spendable Discretionary Income By Age of Household Head, 1983

	Number (thousands)	Percent	Spendable Discretionary Income Aggregate (billions)	Average	Per Capita
Total households	83,918	100.0			
With discretionary income	26,409	31.5	$ 277.9	$10,525	$3,713
Age of householder					
Under 25 years	1,195	21.0	7.7	6,444	2,833
25 to 29 years	2,472	26.1	18.9	7,654	2,867
30 to 34 years	3,355	34.8	30.3	9,021	2,799
35 to 39 years	2,650	30.2	26.8	10,127	2,964
40 to 44 years	2,579	35.5	29.9	11,606	3,056
45 to 49 years	2,224	36.1	26.0	11,674	3,384
50 to 54 years	2,336	37.7	29.2	12,479	4,017
55 to 59 years	2,672	40.7	34.1	12,766	4,889
60 to 64 years	2,180	33.5	25.1	11,506	4,923
65 years and over	4,748	26.9	50.0	10,531	5,633

Source: U.S. Bureau of the Census & The Conference Board, A Marketer's Guide to Discretionary Income (1985)

State & Region

As of the 2nd quarter 1985, almost 21% of the nation's total personal income was concentrated in the Southeast, and this region registered a gain of 6.7% in personal income compared with the 2nd quarter of 1984.

Total Personal Income by Regions, 2nd Quarter 1985 & Average Annual Growth 1978-1984

(Billions of dollars, seasonally adjusted at annual rate)

	Bil. $	Percent	Average Annual Growth 1978-1984
United States	$ 3,190.7	100.0	9.89
New England (Conn., Me., Mass., N.H., R.I., Vt.)	193.1	6.1	10.58
Mideast (Del., D.C., Md., N.J., N.Y., Pa.)	632.2	19.8	9.34
Great Lakes (Ill., Ind., Mich., Oh., Wis.)	558.3	17.5	8.02
Plains (Ia., Ks., Minn., Mo., Neb., N.D., S.D.)	231.9	7.3	9.23
Southeast (Ala., Ark., Fla., Ga., Ky., La., Miss., N.C., S.C., Tn., Va., W.Va.)	657.3	20.6	10.65
Southwest (Ar., N.M., Okla., Tex.)	306.7	9.6	12.02
Rocky Mountain (Colo., Id., Mont., Ut., Wyo.	88.6	2.8	10.78
Far West (Calif., Nev., Ore., Wash.)	499.7	15.7	10.48
Alaska	8.7	0.3	12.20
Hawaii	14.2	0.4	10.02

Source: U.S. Department of Commerce, Bureau of Economic Analysis

Metropolitan Areas

Total Personal Income & Per Capita Personal Income For Consolidated Metropolitan Statistical Areas, 1981-1983

	Total Personal Income (Bil. $)			Per Capita ($)		% of National Average
	1983	1982	1981	1983	1982	1983
United States	$2,734.5	$2,575.8	$2,420.1	$11,687	$11,113	100
CMSAs						
Buffalo	13.9	13.4	12.8	11,329	10,946	97
Chicago, IL	106.2	101.4	97.6	13,249	12,705	113
Cincinnati, OH	19.4	18.4	17.6	11,674	10,995	100
Cleveland, OH	35.0	33.5	32.2	12,503	11,939	107
Dallas, TX	45.2	41.2	37.3	13,846	13,070	118
Denver, CO	25.5	23.9	21.5	14,423	13,844	123
Detroit, MI	58.0	54.7	54.0	12,586	11,810	108
Houston, TX	48.0	47.7	43.5	13,482	13,755	115
Los Angeles, CA	163.1	152.6	143.8	13,379	12,754	114
Miami, FL	36.2	33.8	31.9	12,973	12,141	111
Milwaukee, WI	20.3	19.5	18.6	12,895	12,430	110
New York, NY	254.7	236.4	218.8	14,505	13,516	124
Philadelphia, PA	73.0	68.3	63.6	12,728	11,958	109
Pittsburgh, PA	28.4	27.7	26.6	11,820	11,536	101
Portland, OR	16.0	15.2	14.8	12,016	11,462	103
San Francisco, CA	87.2	80.5	75.0	15,500	14,564	133
Seattle, WA	29.0	27.9	26.4	13,269	12,811	114

Source: U.S. Department of Commerce, Bureau of Economic Analysis, Survey of Current Business (April 1985)

CONSUMER FINANCES

Financial assets and debts make up a relatively small part of the total net worth of U.S. households. Real assets, including houses, property and small businesses constitute almost 80% of the assets of the average consumer. Home mortgages by third quarter 1985 represented about 77% of all household debt.

The most detailed study available on total household assets and liabilities is the 1983 Survey of Consumer Finances, published by the Federal Reserve Board (and covered in some detail in the 1984 edition of the CONSUMER MARKET DEVELOPMENTS Fact File.) This was the first such study since 1977.

In constant (1983) dollars, total financial assets (liquid assets plus stock, bonds, trusts, etc.), had a mean average of $24,128 per household, a median of $2,300 in 1983. Comparable figures (in 1983 dollars) were $24,273 and $3,033, respectively. The mean value of mortgage debt outstanding in 1983 averaged $27,147; median value, $21,010. The mean average of other consumer debt averaged $5,400; the mean, $2,383.

As of the third quarter of 1985, mortgage debt outstanding totaled $2,182.2 billion, 10.5% over the total a year earlier. As of the end of 1985, outstanding consumer installment credit amounted to $541.4 billion, 17.6% over the total a year ago. Total consumer noninstallment credit outstanding--credit scheduled to be paid in a lump sum, including single payment loans, charge accounts, etc.--amounted to $116.6 billion at the end of 1984, up from $96.9 billion at the end of 1983.

CONSUMER FINANCES

Housing Status

In 1984, according to the Census Bureau, 64.3% of U.S. households were owner-occupied. Homeownership, as shown in details published by the Bureau for 1983, varies by age of householder, reaching a peak among those in the 55-64 age group. A Bureau of Labor Statistics analysis of consumer expenditures (1982-1983) shows the pattern in homeownership also varies by region. It is greatest in the Midwest (66%) and least in the West (53%).

Homeownership By Age of Householder: 1983
(Numbers in thousands)

	Number of Households	Percent Owners
Total households	83,918	64.9
Age of householder: (years)		
20 - 24	5,291	20.0
25 - 29	9,465	38.2
30 - 34	9,639	55.7
35 - 39	8,759	65.8
40 - 44	7,261	74.1
45 - 54	12,354	77.1
55 - 64	13,074	80.5
65 - 74	10,603	76.9
75 & over	7,067	71.6

Source: U.S. Bureau of the Census, Household & Family Characteristics (March 1983)

The peak years for the formation of new households were in the 1970's, when the net increase averaged 1.7 million a year. The household count in 1985 was about 1.4 million over the count in 1983. Projections show overall household increases reduced to barely one million a year in 1990-1995. However, the period of slower growth in new households is also characterized by an expanded market for housing by maturing baby-boomers who will be moving into their peak-earning, home-ownership years. Emphasis in the housing market is clearly shifting toward costlier trade-up homes.

A study by the Chicago Title Insurance Co. showed that the average first-time buyer is 28.4 years of age with an income of $37,520, paying $75,100 for a house, for which the downpayment as a percentage of price was 11.4% and monthly house payments represented 32.7% of monthly income. The move-up buyer averages 38.4 years of age and has an income of $47,380, buys a house costing $106,200 for which a downpayment representing 32.7% of the price is paid and has house payments averaging 28% of monthly income.

A combination of lower mortgage rates and a sense of financial well-being sparked by the surge in the stock market is expected to sharpen the demand for housing and related home goods in 1986.

In the longer term, projections by the Population Reference Bureau look for an increase in owner-households from 54,494,000 in 1983 to 61,124,000 in 1990 and to 65,532,000 in 1995. Renter-households are expected to grow from 29,423,000 in 1983 to 31,969,000 in 1990, to 32,840,000 in 1995.

CONSUMER EXPENDITURES

Personal consumption expenditures, including outlays for goods and services, in 1985 amounted to $2,582.1 billion dollars. This was a gain of 6.6% over total spending in 1984 (current dollars), while the gain in disposable personal income in this period was only 4.9%, and the saving rate (percent to disposable income) dropped from 6.5 to 4.6.

On a constant (1982) dollar basis, the 1985/1984 gain in spending was reduced to 3.2%, while the gain in "real" disposable income was 1.6%.

Personal Consumption Expenditures By Major Product Type, 1983-1985
(Billions of current dollars)

	1985	1984(r)	1983(r)	% Change 1985/1984
Personal consumption expenditures	$2,582.1	$2,423.0	$2,229.3	+ 6.6
Durable goods	361.1	331.1	289,6	+ 9.0
Nondurable goods	912.3	872.4	817.0	+ 4.6
Services	1,308.8	1,219.6	1,122.7	+ 7.3

(r) revised

Note: Durable goods are defined as having a useful life of three years or more; nondurable goods, a useful life of less than three years.

Per Capita Disposable Income & Personal Consumption Expenditures
In Current & In 1982 Dollars
1970, 1975, 1980, 1985

	Disposable Personal Income		Personal Consumption Expenditures	
Year	Current $	1982 $	Current $	1982 $
1970	$ 3,489	$ 8,134	$ 3,121	$ 7,275
1975	5,291	8,944	4,689	7,926
1980	8,422	9,723	7,608	8,784
1985	11,727	10,504	10,810	9,682
Percent Change:				
1975/1970	+ 51.6	+ 10.0	+ 50.2	+ 8.9
1980/1975	+ 59.2	+ 8.7	+ 62.2	+ 10.8
1985/1980	+ 39.2	+ 8.0	+ 42.1	+ 10.2

Source: U.S. Department of Commerce, Bureau of Economic Analysis.

It is clear from the above that as growth in real income has slowed, consumers have continued to spend, while reducing savings and taking out loans. However, this trend was generally not expected to continue. As the economy improves, most consumers should tend to place greater emphasis on repaying loans and building up bank balances. However, if the stock market continues a steep rise, or remains at a high level, this will have an effect--called "wealth effect"--on consumer spending, bolstering expenditures by as much as $13 billion to $40 billion over the next year.

CONSUMER EXPENDITURES

On a constant dollar basis, real spending for durable goods in 1985 rose 8.2% compared with 1984; for nondurable goods, 2.3%; for services, 2.5%. Spending for automobiles and for furniture and appliances bolstered the durable goods total to 14% of total spending last year, up from 13% in 1983. Housing expenditures went up from 15.3% of total expenditures in 1984 to 15.6% in 1985. Nondurable expenditures continued to drift downward in share of total spending, dropping from 36.6% in 1983 to 36.0% in 1984, then down to 35.3% in 1985. All major components in the nondurable goods category shared in the decline.

Total Personal Consumption Expenditures by Major Type of Product, 1983-1985
(Billions of $)

	1985	1984(r)	1983(r)
Personal consumption expenditures	$2,582.1	$2,423.0	$2,229.3
Durable goods	361.1	331.1	289.6
Motor vehicles & parts	167.7	153.8	130.6
Furniture & household equip.	128.9	119.4	107.4
Other	64.5	57.9	51.7
Nondurable goods	912.3	872.4	817.0
Food	474.2	451.7	422.0
Clothing & shoes	156.1	147.4	135.2
Gasoline & oil	92.0	90.7	90.1
Other nondurable goods	190.0	182.6	169.6
Services	1,308.8	1,219.6	1,122.7
Housing	403.3	371.3	344.0
Household operation	173.2	166.0	155.9
Transportation	86.8	82.1	74.7
Medical care	280.3	259.5	237.4
Other	365.2	340.7	310.7
	Percent of Total Expenditures		
Personal consumption expenditures	100.0	100.0	100.0
Durable goods	14.0	13.7	13.0
Motor vehicles & parts	6.5	6.3	5.8
Furniture & household equip.	5.0	4.9	4.8
Other	2.5	2.4	2.3
Nondurable goods	35.3	36.0	36.6
Food	18.4	18.6	18.9
Clothing & shoes	6.0	6.1	6.1
Gasoline & oil	3.6	3.7	4.0
Other durable goods	7.4	7.5	7.6
Services	50.7	50.3	50.4
Housing	15.6	15.3	15.4
Household operation	6.7	6.8	7.0
Transportaion	3.4	3.4	3.3
Medical care	10.9	10.7	10.6
Other	14.1	14.1	13.9

(r) revised

Source: U.S. Bureau of Economic Analysis

CONSUMER EXPENDITURES

Spending Patterns: Selected Household Characteristics

Results in the 1982-1983 Consumer Expenditure Survey have recently been released by the Bureau of Labor Statistics, updating findings in the 1980-1981 reports. The study is based on two separate surveys among a representative sample of consumer units throughout the Nation: a diary survey covering frequent, easy-to-forget purchases, such as food and household supplies, and an interview survey consisting of a series of five quarterly interviews covering expenditures made in the preceding three months.

This study is the most comprehensive information available on consumer characteristics (in terms of a "consumer unit" and on spending habits. A consumer unit can be roughly defined as a household. The "householder" is the person who owns the residence or who pays the rent.

From detailed reports issued by the BLS, the following tables summarize average spending in terms of selected consumer unit characteristics. An average of $18,892 (83.2% of household income) was spent on an annual basis in the 1982-83 period. Where the householder was 45-54 years of age, spending averaged $24,718 (only 79.2% of income). Most of these homes had two earners. Households with incomes of $40,000 or more averaged 3.3 persons of which 2.2 persons were earners. Total spending averaged almost $38,000 annually in this group. Different patterns in spending in total and by product or expenditure type will be found in the complete BLS reports, including breakdowns for consumer units by number of earners as well as by region of the country, in addition to income and age of householder.

Average Annual Expenditures of Urban Consumer Units (Households), 1982-83 By Age of Householder

		Age of Householder					
	Total	Under 25	25 - 34	35 - 44	45 - 54	55 - 64	65 & Over
Number (thousands)	71,570	7,013	17,210	13,028	10,034	10,436	13,849
	100.0	9.8	24.0	18.2	14.0	14.6	19.4
CONSUMER UNIT CHARACTERISTICS	(averages)						
Income before taxes	$22,702	$11,537	$23,835	$29,718	$31,198	$24,450	$13,583
Size of consumer unit	2.6	1.8	2.7	3.5	3.2	2.4	1.7
Age of householder	46.2	21.7	29.7	39.0	49.6	59.4	73.5
Number in consumer unit							
Earners	1.3	1.3	1.4	1.8	2.0	1.4	0.4
Vehicles	1.8	1.1	1.8	2.2	2.5	2.0	1.1
Children under 18	0.7	0.3	1.0	1.5	0.7	0.2	0.1
Percent homeowner	60	10	43	70	75	80	71

(continued)

Average Annual Expenditures of Urban Consumer Units (Households), 1982-83 By Age of Householder

(continued)

	Total	Age of Householder Under 25	25 - 34	35 - 44	45 - 54	55 - 64	65 & Over
AVERAGE ANNUAL EXPENDITURES	$18,892	$11,617	$19,271	$24,296	$24,718	$19,497	$12,346
% of income before taxes	83.2%	101.0%	80.8%	81.7%	79.2%	79.7%	90.9%
Food	$ 3,137	$ 1,835	$ 2,949	$ 4,046	$ 4,166	$ 3,328	$ 2,288
Alcoholic beverages	285	343	356	322	307	260	133
Housing	5,784	3,410	6,409	7,494	6,870	5,374	4,123
Shelter	3,262	2,151	3,915	4,411	3,658	2,697	2,073
Owned dwellings	1,913	325	2,059	3,087	2,449	1,792	1,134
Rented dwellings	1,049	1,681	1,637	937	761	538	699
Other lodging	300	145	219	386	448	367	240
Fuel, utilities, etc.	1,489	668	1,305	1,789	1,969	1,701	1,342
Household operations	271	115	359	327	226	208	267
Householdfurnishings, equip.	762	475	831	968	1,016	767	440
Apparel & services	1,030	782	1,071	1,428	1,366	993	515
Transportation	3,712	2,623	4,052	4,758	4,991	3,656	1,972
Health care	822	307	547	753	936	1,056	1,228
Entertainment	870	581	977	1,294	1,075	799	390
Personal care	176	92	148	203	223	213	166
Education	274	489	180	343	590	197	45
Other (tobacco, insurance, contributions, etc.)	2,676	1,080	2,461	3,500	4,040	3,482	1,380

Source: U.S. Bureau of Labor Statistics,
Consumer Expenditures Survey, 1982-83 (Sept. 1985)

Spending Patterns By Household Characteristics

Average Annual Expenditures of Urban Consumer Units (Households), 1982, 1983 Classified By Income Before Taxes (Selected Groups)

	Selected Household Income Groups $20,000 $29,999	$30,000 $39,999	$40,000 & Over
Number (thousands)	11,865	7,558	9,112
CONSUMER UNIT CHARACTERISTICS (averages)			
Income before taxes	$24,587	$34,353	$57,777
Size of consumer unit	2.9	3.1	3.3
Age of householder	42.2	42.5	44.8
Number in consumer unit:			
Earners	1.6	1.9	2.2
Vehicles	2.2	2.5	2.9
Children under 18	0.9	0.9	0.9
Percent homeowner	65	78	89

(continued)

Average Annual Expenditures of Urban Consumer Units (Households), 1982, 1983 Classified By Income Before Taxes (Selected Groups)

(continued)

	Selected Household Income Groups		
	$20,000 $29,999	$30,000 $39,999	$40,000 & Over
CONSUMER UNIT CHARACTERISTICS (Cont'd.)			
AVERAGE ANNUAL EXPENDITURES	$20,662	$25,781	$37,922
% of income before taxes	83.9	75.0	65.6
Food	3,381	3,961	5,078
Alcoholic beverages	339	377	494
Housing	5,977	7,423	11,031
Shelter	3,368	4,162	6,347
Owned dwellings	1,937	2,871	4,928
Rented dwellings	1,191	916	575
Other lodging	239	375	844
Fuel, utilities, etc.	1,576	1,797	2,205
Household operations	260	345	656
Housefurnishings, equipment	774	1,120	1,823
Apparel & services	1,042	1,384	2,287
Transportation	4,342	5,298	7,314
Health care	893	902	1,100
Entertainment	1,007	1,292	2,024
Personal care	182	222	327
Education	166	272	646
Other (tobacco, insurance, contributions, etc.)	3,152	4,484	7,382

Source: U.S. Bureau of Labor Statistics, *Consumer Expenditure Survey*, 1982-83 (Sept. 1985)

Personal Consumption Expenditures For Apparel & Homefurnishings

Based on U.S. Bureau of Census data, following are figures on personal consumption expenditures for selected categories. This represents the total value at retail of merchandise reaching the consumer, including sales through retail outlets as well as through other sources.

Personal Consumption Expenditures For Apparel, Footwear & Homefurnishings 1982-1984

	Millions of $			% To Disposable Income		
	1984	1983(r)	1982(r)	1984	1983	1982
Clothing & accessories, (not incl. military clothing, jewelry, or footwear)*	$125.5	$114.8	$105.4	4.7%	4.7%	4.7%
Women's, girls', infants' total	83.8	76.4	69.5	3.1	3.1	3.1
Men's & boys', total	41.7	38.5	35.9	1.6	1.6	1.6
Footwear, total	21.8	20.3	18.9	0.8	0.8	0.8

(continued)

CONSUMER EXPENDITURES

Personal Consumption Expenditures For Apparel, Footwear & Homefurnishings 1982-1984
(continued)

	Millions of $			% To Disposable Income		
	1984	1983(r)	1982(r)	1984	1983	1982
Homefurnishings, total	$132.9	$119.7	$107.1	5.0%	4.9%	4.7%
Furniture & bedding	26.6	23.8	21.6	1.0	1.0	1.0
Major appliances, elec. housewares	21.7	19.7	17.7	0.8	0.8	0.8
Dinnerware, tableware, glassware						
Other durable homefurnishings**	26.9	24.1	21.5	1.0	1.0	0.9
Semi-durable homefurnishings***	13.4	12.3	11.4	0.5	0.5	0.5
Home entertainment (TV, radios, records, electronic sys.)	32.0	28.6	24.5	1.2	1.2	1.1

* Luggage is included in the apparel classification.

** Includes floor coverings, blankets, pillows, picture frames, art products, lamps, hand and power tools, etc.

*** Mainly textile homefurnishings except where included above. Includes piece goods for homefurnishings; also lamp shades, brooms, brushes.

(r) revised

Source: Based on reports from the Department of Commerce, Office of Business Economics.

CONSUMER PRICES

In 1985, the consumer price index advanced 3.8%, compared with 4.0% the previous year and an average of 10.9% in the years 1977-1981. In 1986, upward price pressures due to a lower value of the dollar against major foreign currencies, stronger economic growth and higher utilization rates, are expected to be countered by the decline in the average price of crude oil and lower wage increases. An increase of about 4% in consumer prices is generally expected for the year.

Percent Increase In Consumer Prices

	December 1977-1981	12 months ended December			
		1982	1983	1984	1985
All items	10.9	3.9	3.8	4.0	3.8
Food	9.1	3.1	2.6	3.8	2.7
Shelter	13.4	2.4	4.7	5.2	6.0
Energy	18.4	1.3	-0.5	0.2	1.8
All other items	8.2	6.1	5.0	4.4	3.7

Source: Bureau of Labor Statistics.

The CPI for all urban consumers for medical care in December 1985 was 6.7% higher than in December 1984; the index for apparel and upkeep was up 2.9%.

FAIRCHILD FACT FILES CURRENTLY AVAILABLE

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

DEPARTMENT STORE SALES: (Including selected major apparel specialty store sales) Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now--1986 Edition available in January)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. (1984 Edition available now--1985 Edition will be available in August, 1985).

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchanising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (Includes a new consumer buying intention survey) (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: (Including Tailored Casual Wear) Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (November)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and physical fitness.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons are made with findings in the last previous census, covering operations in 1977. (December)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (August)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change. For orders and further information, please write to:

FAIRCHILD FACT FILES,
Fairchild Books,
7 East 12th Street, New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C3400-1.83-F

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

A Statistical Analysis of Retailing

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst
Kenneth Greenman, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

TABLE OF CONTENTS

INTRODUCTION.. 1
  GENERAL EXPLANATION OF TERMS AND SELECTED KINDS-OF-BUSINESS............. 2
  RETAIL SALE PROFILES.. 5
    TOTAL RETAIL TRADE.. 8
    DEPARTMENT STORES...10
    VARIETY STORES..12
    MISCELLANEOUS GENERAL MERCHANDISE STORES............................14
    MEN'S AND BOYS' WEAR..16
    WOMEN'S WEAR SPECIALTY STORES.......................................18
    WOMEN'S READY-TO-WEAR STORES..21
    FAMILY CLOTHING STORES..23
    CHILDREN'S AND INFANTS WEAR STORES..................................25
    SHOE STORES...27
    JEWELRY STORES..29
    SEWING, NEEDLEWORK, PIECE GOODS STORES..............................31
    HOBBY, TOY & GAME STORES..33
    SPORTING GOODS STORES...35
    GENERAL LINE SPORTING GOODS...39
    SPECIALTY LINE SPORTING GOODS STORES................................41
    FURNITURE STORES..42
    FLOOR COVERING STORES...44
    DRAPERY, CURTAIN, UPHOLSTERY STORES.................................47
    MISCELLANEOUS HOMEFURNISHINGS STORES................................48
    HOUSEHOLD APPLIANCE STORES..50
    RADIO TELEVISION STORES...52
    HARDWARE STORES...54
    GROCERY STORES/SUPERMARKETS...56
    DRUG AND PROPRIETARY STORES...58
    RETAILER TYPE: MAIL ORDER HOUSES....................................60
    RETAILER TYPE: DIRECT SELLING ESTABLISHMENTS........................63

SCHEDULE OF ADDITIONAL FACT FILES.......................................64

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add up to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1985 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-525-9

Printed in the United States of America

A STATISTICAL ANALYSIS OF RETAILING BASED ON THE 1982 CENSUS OF RETAIL TRADE

INTRODUCTION

Every five years, starting in 1930, the U.S. Department of Commerce, Bureau of the Census, has collected detailed information on retail trade, nationwide, as part of the economic census program (which also includes manufactures, wholesale trade and service industries).

Based on a series of detailed reports covering the 1982 Census of Retail Trade which has recently been issued by the Census Bureau, this Fact File summarizes and analyzes important findings on retail firms, the stores operated and sales volume. (Also see the Fact File: SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE--1986 Edition).

The information on the following pages is based entirely on the 1982 census covering stores with payroll, with some comparisons covering 1977 census data. Current estimates on total retail sales by store type are provided on a monthly and on an annual basis in the Census Bureau's Current Business Reports. Unlike the 1982 census data, the current reports cover both stores with paid employees and those without payroll; the reports also include leased department operations within data on the lessor store (rather than reported as separate operations, as explained in this INTRODUCTION.)

Data for the year 1984 is reported below to give an indication of current volume by store type, and trends since 1982.

Estimated Retail Sales By Outlet Type, 1984 & Percent Change 1984/1982
(Covers all outlets. Sales in millions of dollars)

	1984	Percent Change 1984/1982**
Retail trade, total	$ 1,297,015	21.0
Outlet type*		
Nondurable goods, total	832,728	13.2
General merchandise group stores	153,642	19.3
Department stores	129,284	20.6
Variety stores	9,067	8.8
Misc. general merchandise stores	15,291	15.4
Apparel & accessory stores	66,891	21.0
Men's & boys' wear stores	8,432	9.6
Women's clothing & accessory stores	27,899	26.9
Women's ready-to-wear stores	25,759	27.1
Family clothing stores	17,567	27.3
Shoe stores	10,339	13.1
Food stores	269,959	10.0
Grocery stores	252,936	9.9
Retail bakeries	4,135	12.7
Eating & drinking places	124,109	18.8
Drug & proprietary stores	44,165	22.2
Liquor stores	19,494	8.0
Nonstore retailers	26,243	10.2
Gasoline service stations	100,997	4.0

(continued)

Estimated Retail Sales By Outlet Type, 1984 & Percent Change 1984/1982
(Covers all outlets. Sales in millions of dollars)
(continued)

	1984	Percent Change 1984/1982**
Durable goods, total	$ 464,287	37.9
Jewelry stores	10,272	22.4
Homefurnishings stores group	63,581	84.9
Furniture stores	22,474	27.3
Household appliance, radio, TV stores	24,034	53.2
Household appliance stores	7,899	35.4
Building material, hardware, garden supply & mobile home dealers	68,703	34.9
Building material & supply stores	49,774	41.6
Hardware stores	9,530	10.1
Automotive dealers	277,008	43.4
Auto & home supply stores	24,384	17.4

* Table covers major outlet types. Major store groups may include store types not separately listed.

**1982 adjusted for comparability with 1984.

Source: Based on U.S. Bureau of the Census *Current Business Reports*

General Explanation of Terms & Selected Kinds-of-Business Classifications

Firms: A business organization or entity consisting of one or more domestic establishments (locations), under common ownership or control. In the data covered in this Fact File, only firms (companies) with payroll are included.

Establishments/Stores: These terms cover a single physical location where business is conducted. It is not necessarily identical with a company or enterprise (firm), which may consist of one or more establishments. Census of retail trade figures represent a summary of reports for individual establishments rather than companies. When more than one activity is carried on at a single location under a single ownership, the entire retail establishment has been classified on the basis of its major activity, unless the activities are very separate and distinct. Only stores with paid employees are included in the 1982 census data by kind of business.

Leased Departments: Separately owned businesses operated as departments or concessions of retail business under another ownership (such as a separately owned shoe department in a department store) are treated as separate establishments and classified according to the kind of business conducted in the 1982 census reports. In earlier censuses, data for a leased department was included in the kind-of-business statistic for the lessor store. Because of this change, the Census Bureau retabulated 1977 total store data at the State and U.S. levels to put them on a comparable basis with the 1982 data. However, this adjustment has not been made for data on sales by merchandise line.

General Explanation of Terms & Selected Kinds-of-Business Classifications (continued)

Merchandise Lines: In addition to the treatment of leased departments, which affects merchandise line sales for specific outlet types (though not total sales), the 1982 census showed that the 31 broad merchandise lines covered in 1977 were expanded to total 34 broad merchandise lines, again affecting direct comparability. The merchandise line data reported in the census reflect the sales experience of retail establishments with payroll only.

Catalog Order Desks: These operations within retail stores, particularly department stores (such as the department store outlets operated by Sears, Roebuck, etc.), are included in the data for the stores in which they are operated. Sales attributed to mail order houses cover establishments primarily selling merchandise as a result of orders received by mail.

Kinds of Business: In classifying store or retail establishment types, the U.S. Bureau of the Census follows the Standard Industrial Classification (SIC) system. Retail trade major SIC groups 52 through 59 in the 1972 SIC manual includes establishments engaged in selling merchandise for personal or household consumption and in rendering services incidental to the sale of the goods. Sales do not include retail sales by manufacturers, wholesalers, service establishments, or other businesses whose primary activity is other than retail trade.

Although the count on stores, or establishments, in the data on merchandise line sales represents the number in business at the end of the year, the sales figures include sales of all establishments in business at any time during the year. Sales figures are net after deductions for refunds and allowances for merchandise returned by customers. Sales taxes collected from customers are not included in the sales totals.

For the most part, the store definitions are self-evident in assigned SIC classifications. However, some require explanation, as noted below:

Department stores (SIC 531): Establishments normally employing 25 people or more, having combined sales of apparel and soft goods amounting to 20% or more of total sales, and selling each of the following lines of merchandise:

1. Furniture, homefurnishings, appliances, radio and TV sets.
2. A general line of apparel for the family.
3. Household linens and dry goods (home textiles).

Leased department employment and merchandise lines are taken into account in classifying department stores; however, starting with the 1982 census, leased department sales are not counted in the department store sales total (or in any other type of store in which they are operated).

To qualify as a department store, sales of each of the three lines listed above must be less than 80% of total store sales. A store with total sales of $10 million or more is classified as a department store even if sales of one of the three merchandise lines listed exceed 80% of the total, provided that the combined sales of the other two are $1 million or more. In this connection, it should be noted that operators of department stores (firms) have become increasingly diversified in recent years, opening stores that are not in the department store classification.

General Explanation of Terms & Selected Kinds-of-Business Classifications (continued)

The section RETAIL STORE PROFILES includes some special breakdowns issued by the Census Bureau on types of department stores included in SIC 531, covering total store counts and total sales (but not covered in detail in connection with merchandise line sales).

Conventional department stores: Stores which satisfy the criteria of a deparment store SIC 531, as described above, and--

1. Usually provide check-out service and customer assistance in each department.
2. Frequently have a catalog order desk.
3. Are not affiliated with a company which operates similar stores on a national basis.

National chain department stores: Stores which satisfy the criteria of a department store (SIC 531) as described above, and--

1. Usually provide check-out service and customer assistance in each department.
2. Usually have a catalog order desk.
3. Are affiliated with a company which operates similar stores on a national basis.

Discount or mass merchandising department stores: Stores which satisfy the criteria of a department store SIC 531, as described above, and--

1. Convey the image of a high-volume, fast turnover outlet selling a variety of merchandise for less than conventional prices.
2. Provide centralized check-out service.
3. Do not provide customer assistance within store departments. Merchandise is normally sold through self-service with minimal assistance provided in any department.
4. Do not have a catalog order desk.

Variety stores (SIC 533): Stores engaged in the retail sales of a variety of merchandise in the low and popular price ranges. Sales are usually on a cash-and-carry basis, with the open selling method of display and customer selection of merchandise. These stores generally do not carry a complete line of merchandise, are not departmentalized, do not carry their own charge service, and do not deliver merchandise.

Miscellaneous general merchandise stores (SIC 539): Stores usually selling a general line of apparel, home textiles, hardware, homewares or homefurnishings, groceries and other lines in limited amounts. Stores covered in the department store definition having less than 25 employees are included in this definition. (These stores are often called "junior department stores").

Mail order houses (SIC 5961): Establishments primarily selling merchandise as a result of orders received by mail. Customers are reached through catalogs, mailing pieces, newspaper and magazine ads, and ads on radio and television. NOTE: Departmentalized retail stores operated by mail order houses, which meet the definition covering SIC 531, or specialized stores operated by mail order houses--such as appliance stores--are classified and counted in data on those specific store types.

General Explanation of Terms & Selected Kinds-of-Business Classifications (continued)

In some tabulations at the national level, mail order houses have been divided by the Census Bureau into subclassifications on the basis of the merchandise they sell: department store merchandise, other general merchandise, and other mail order houses.

Direct selling establishments (SIC 5963): Establishments primarily selling merchandise by house-to-house canvass, by party plan, by telephone, or from a truck. The "establishment" is the location from which the canvassers operate. Canvassers who do not have any paid help are excluded from the tabulations in this report. In some tabulations at the national level, direct selling organizations are divided into subclassifications on the basis of the merchandise they sell, including: furniture; home furnishings, and equipment; mobile food service; books and stationery; and other direct selling.

NOTE: This FACT FILE covers information on retail trade in total and on the important types of retail business. However, the detailed Census Bureau reports do include breakouts covering store types not separately covered in the FACT FILE.

RETAIL STORE PROFILES

In the table immediately following, the Census Bureau has adjusted sales figures for 1977 to be comparable with 1982, based on the treatment of leased departments. The Fairchild Research Division has made estimates on 1977 store counts to be comparable, based on available information, with 1982 counts on establishments with payroll.

However, these adjustments have not been possible on figures covering retail operations by sales size, single and multi-unit firms and stores, etc., covered in the tables on selected store types. In connection with 1982/1977 comparisons, attention is again called to the explanation on the treatment of leased departments (INTRODUCTION, page 2). Direct comparability is also affected by differences in timing of Census Bureau figures--variously reported as covering retail operations in business the entire year, of those operating for any part of the year, or those in operation at the end of the year. Where percentages for both 1977 and 1982 are shown, the figures are believed to be fairly comparable, but should be used with the above in mind.

SUMMARY OF U.S. RETAIL TRADE BY OUTLET TYPE: 1982 AND 1977
(Covering establishments with payroll operating anytime during the year)

	Number of Establishments*		% Change in Establishments	Sales (Mil. $)**		% Change in Sales
	1982	1977(e)	1982/1977	1982	1977	1982/77
RETAIL TRADE, TOTAL	1,330,316	1,318,991	+ 0.9	$1,039,028.7	$696,959.6	+ 49.1
GENERAL MERCHANDISE STORE GROUP	34,145	38,353	- 11.0	119,946.9	87,332.5	+ 37.3
Department stores	9,981	8,807	+ 13.3	99,170.2	71,053.3	+ 39.6
Conventional	2,400	nr	—	31,774.5	nr	—
Discount/mass merchandising	5,764	nr	—	38,798.8	nr	—
National chain	1,817	nr	—	28,596.9	nr	—
Variety stores	10,989	14,152	- 22.4	8,090.2	6,841.2	+ 18.3
Misc. gen. mdse. stores	13,175	15,394	- 14.4	12,686.5	9,437.9	+ 34.4
APPAREL & ACCESSORY STORE GROUP	134,137	122,469	+ 9.5	56,869.1	36,318.6	+ 56.6
Men's & boys' wear stores	17,480	21,093	- 17.1	7,734.5	6,937.1	+ 11.5
Women's wear stores	50,961	45,892	+ 11.0	21,989.3	13,335.3	+ 64.9
Ready-to-wear stores	44,163	40,227	+ 9.8	20,248.9	12,343.7	+ 64.0
Accessory & specialty stores (hosiery, intimate apparel, etc.)	5,866	4,731	+ 24.0	1,740.4	991.6	+ 75.5
Furriers & fur shops	932	934	- 0.2	519.2	308.7	+ 68.2
Family clothing stores	17,859	16,025	+ 11.4	13,451.0	7,801.0	+ 72.4
Children's/infants' wear stores	5,325	4,367	+ 21.9	1,356.0	108.0	+ 91.5
Custom tailors & specialized apparel, accessory stores (uniforms, swimwear, sports apparel, wigs, etc.)	6,235	5,086	+ 22.6	1,062.8	612.6	+ 73.5
Shoe stores	36,277	24,450	+ 48.4	11,275.4	6,924.6	+ 62.8
Men's shoe stores	4,153	3,306	+ 25.6	1,110.7	732.0	+ 51.7
Women's shoe stores	7,832	4,934	+ 58.7	2,633.1	1,569.7	+ 67.7
Children's/juveniles' shoe stores	994	901	+ 10.3	218.1	145.6	+ 49.8
Family shoe stores	23,298	15,309	+ 52.2	7,313.6	4,477.3	+ 63.3
Luggage & leather goods stores	1,883	1,643	+ 14.6	589.4	348.8	+ 69.0
Jewely stores	22,786	20,922	+ 8.9	8,352.4	5,293.6	+ 57.8
Sewing, needlework, piece goods stores	9,774	10,184	- 4.0	2,494.7	1,867.7	+ 33.6
Sporting goods stores & bicycle shops***	20,152	17,147	+ 17.5	7,514.9	4,190.0	+ 79.4
General line sporting goods store	9,252	7,865	+ 17.6	4,377.5	2,427.6	+ 80.3
Specialty line sporting goods & bicycle shops***	10,900	9,282	+ 17.4	3,137.4	1,762.4	+ 78.0
Hobby, toy, game shops	7,691	6,615	+ 16.3	3,237.6	1,525.0	+112.3

Footnotes (*) are at end of table.

(continued)

SUMMARY OF U.S. RETAIL TRADE BY OUTLET TYPE: 1982 AND 1977
(Covering establishments with payroll operating anytime during the year)

RETAIL TRADE, (continued)	Number of Establishments* 1982	Number of Establishments* 1977(e)	% Change in Establishments 1982/1977	Sales (Mil. $)** 1982	Sales (Mil. $)** 1977	% Change in Sales 1982/77
HOME FURNISHINGS STORE GROUP	93,734	92,236	+ 1.6	$ 45,314.2	$ 31,707.3	+ 42.9
Furniture stores	29,609	31,366	- 5.6	17,223.4	13,623.0	+ 26.4
Floor covering stores	11,125	11,234	- 1.0	5,015.5	3,808.3	+ 31.7
Drapery, curtain, uphol. stores	4,063	4,488	- 0.6	858.1	670.4	+ 28.0
Misc. home furnishings spec. stores (lamp stores, china/glass stores, blind/shade stores, picture/mirror stores, etc.)	9,649	6,579	+ 46.6	2,974.7	1,310.8	+126.9
Household appliance stores	10,542	12,285	- 14.2	5,697.3	4,512.5	+ 26.3
Radio/TV stores	19,462	16,744	+ 16.2	9,764.2	5,046.3	+ 93.5
Record shops	4,420	3,655	+ 20.9	1,903.6	1,122.2	+ 69.6
Musical instrument stores	4,864	5,748	- 15.4	1,877.4	1,606.0	+ 16.9
Paint, glass, wallpaper stores	8,996	9,307	- 3.3	3,375.4	2,317.3	+ 45.7
Hardware stores	19,870	19,497	+ 1.9	8,335.1	5,747.3	+ 45.0
Nurseries, lawn & garden supply stores	7,850	6,947	+ 13.0	2,873.4	1,590.2	+ 80.7
AUTOMOTIVE GROUP, TOTAL	91,068	95,516	- 4.7	190,752.1	147,379.6	+ 29.4
Auto & home supply stores	40,729	37,505	+ 8.6	20,713.7	12,623.8	+ 64.1
Gift, novelty, souvenir shops	22,311	17,161	+ 30.0	4,619.8	2,235.9	+106.6
Book stores	9,355	17,606	- 46.9	3,133.0	1,724.1	+ 81.7
Stationery stores	4,750	4,838	- 1.8	1,494.8	1,063.8	+ 40.5
Camera & photographic supply stores	4,003	3,577	+ 11.9	1,884.2	1,115.4	+ 68.9
FOOD STORE GROUP	176,219	172,474	+ 2.2	240,519.7	153,248.4	+ 56.9
Grocery stores/supermarkets	128,494	126,842	+ 1.3	226,609.1	144,295.4	+ 57.0
Meat/seafood markets	10,995	11,257	- 2.3	5,274.2	3,492.7	+ 51.0
Bakery stores	17,580	16,286	+ 7.9	3,542.7	2,193.0	+ 61.5
Other food stores	19,150	18,089	+ 5.9	5,093.9	3,267.3	+ 55.9
DRUG & PROPRIETARY STORES	49,527	47,850	+ 3.5	36,242.4	23,241.6	+ 55.9
Drug stores	46,661	44,388	+ 5.1	34,940.7	22,452.7	+ 55.6
NONSTORE RETAILERS	21,803	20,830	+ 4.7	20,155.4	14,080.9	+ 43.1
Mail order houses	7,433	6,721	+ 10.8	11,253.7	7,441.4	+ 51.2
Department store merchandise	3,172	3,659	- 13.3	4,265.9	3,447.8	+ 23.7
Other general merchandise	605	513	+ 17.9	911.3	379.3	+140.2
Other	3,656	2,549	+ 43.4	6,076.4	3,614.3	+ 68.1
Direct selling establishments	8,724	8,370	+ 4.2	4,175.1	2,939.1	+ 42.1
Furniture, homefurnishings & equipment	2,587	2,449	+ 5.6	1,105.7	673.2	+ 64.3
Books & stationery	1,082	1,214	- 10.9	729.9	554.2	+ 31.7
Retail trade, nec.	32,823	27,037	+ 21.4	7,078.5	3,989.4	+ 77.4

NOTE: In some cases, group totals include retail outlet types which are not separately listed.

Footnotes (*) are at end of table.

RETAIL STORE PROFILES

(footnotes continued from preceding table)

* In the 1982 census, each leased department was treated as a separate establishment and was classified according to the kind of business conducted. As originally reported, data based on the 1977 census covering leased departments was included in the kind-of-business statistics of the lessor store. Based on census data, the Fairchild Research Division has estimated the number of establishments with payroll in 1977 comparable to the 1982 census counts, based on the new treatment of leased departments. Sales data have been adjusted for comparability by the Census Bureau. (These adjustments are not available in data on store size, employment size, etc.)

** It should be noted that sales totals are in current dollars and the effects of inflation have a bearing on reported sales increases.

*** Relatively few bicycle shops have paid employees and therefore represent a small part of the total.

(e) estimated.

nr not reported.

nec not elsewhere classified. Detailed Census Burea reports do include breakouts for store types not shown in the above table.

Source: U.S. Bureau of the Census,
Census of Retail Trade RC82-A-52,
RC77-A-52

TOTAL RETAIL TRADE

According to the 1982 Census of retail trade, a total of 905,591 retail companies operated 1,330,316 retail outlets which had one or more paid employees. These outlets had sales totaling $1.0 trillion that year. In 1977, 1,015,624 firms operated an estimated 1,318,991 retail outlets with payroll, and had sales amounting to $697 billion.

Counting retail operations without paid employees, the 1982 census reported a total of 1,923,228 retail outlets with sales amounting to $1.1 trillion. Detailed information in the census, on which this Fact File is based, was reported by the Census Bureau only for retail operations with paid employees. However, the retailers without payroll had a sales total in 1982 amounting to only $9,026 million, or 8.5% of total retail trade, while accounting for 592,912 outlets (30.8% of all retail outlets).

In the five-year span, 1977-1982, retail sales (in current dollars) of stores with payroll increased 49.1%. However, this was a period marked by two years of double-digit inflation. In 1979, the Consumer Price Index rose 13.3% over the previous year; in 1980, the CPI went up 12.4%. The 1982 CPI for all items except food, energy, and shelter stood at 245.6 -- 44.9% over the comparable CPI for 1977. (The 1984 CPI excluding food, energy and shelter stood at 271.2-- 10.4% over 1982). Counting food, energy and shelter, the 1982 CPI was 59.3% above 1977. The index for apparel and upkeep in 1982, however, rose only 24.4% compared with the 1977 index. (In 1984, it was 4.4% above 1977). Thus, it will be seen that inflation in the period covered by this report affected sales gains to varying degrees, but should be kept in mind when comparing sales totals in 1982 vs. 1977.

RETAIL STORE PROFILES

U.S. Retail Trade (With Payroll)

CONCENTRATION OF LARGEST FIRMS

	Stores Operated		Sales ($ figures in millions)	
	1982	1977	1982	1977
Total	1,330,316	1,318,991	$1,039,028.7	$ 696,959.6
All firms - Percent	100.0%	100.0%	100.0%	100.0%
4 largest firms	0.7	0.6	5.5	6.3
8 largest firms	1.0	1.0	8.8	9.6
20 largest firms	2.0	1.8	13.9	14.3
50 largest firms	3.6	3.3	19.8	19.3

SINGLE UNIT VS. MULTI-UNIT OPERATIONS

	1982			1977		
	Firms	Stores	Sales	Firms	Stores	Sales
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Single unit organizations	95.9	78.4	45.8	95.7	74.6	50.6
Multi-unit organizations	4.1	21.6	54.2	4.3	25.4	49.4
Less than 10 stores	3.9	7.7	13.5	4.0	9.3	11.6
10 or more stores	0.2	13.9	40.7	0.3	16.1	37.8
50 or more stores	*	10.9	33.7	0.1	12.5	31.1

* Less than 0.1%.

Source: U.S. Bureau of the Census,
Census of Retail Trade
RC82-1-1, RC77-S-1

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Department Stores SIC Code 531

Department store business has become increasingly concentrated among the largest firms. The 1982 census showed 502 department store firms--including entities like Federated, Dayton Hudson, R.H. Macy, etc.--operating 9,981 stores (including discount department stores and department store outlets of mail order chains/mass merchandisers such as Sears and Penney, as well as conventional department stores).

The 50 largest firms in this classification accounted for 85.4% of the stores in 1982--up from 73.8% in 1977. They controlled almost 92% of 1982 department store sales compared with 86.5% in 1977.

Multi-unit organizations have expanded in the five-year span. In 1977, over half of the department store firms (52.5%) operated just one department store. By 1982, this figure fell to only 35.5%. The number of firms operating two to four stores jumped from 23.3% of the firms in 1977 to 40.4% in 1982. Firms operating 50 or more stores clearly dominate the department store picture. The 33 firms in this category in 1982 controlled 82% of the stores and 86.2% of sales. Firms of this size in 1977 operated about 69% of the stores, with 76% of sales.

Department store firms with a volume of $100 million or more (13.6% of the 1982 total) operated 89% of the department stores and had a 94.3% sales share. Of individual stores, department store units which had an annual volume of $5 million or more in 1982 controlled about 90% of total sales compared with an 82% share for stores of this size in 1977. (Keep in mind that store units include branch stores as well as main stores).

On an individual store basis, large department stores--those with 100 or more employees--accounted for 60% of stores and 83% of sales in 1982, close to their share of 61% of stores and 86% of sales in 1977.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982**	Sales, 1982 (mil. $)***	Percent of Total 1982 Stores	Percent of Total 1982 Sales	Percent of Total 1977 Stores	Percent of Total 1977 Sales
All firms#	9,981	$ 99,170.2	100.0	100.0	100.0	100.0
4 largest firms*	3,749	41,639.7	37.6	42.0	32.6	44.0
8 largest firms*	5,173	57,338.3	51.8	57.8	41.6	56.8
20 largest firms*	6,987	80,804.1	70.0	81.5	57.1	73.5
50 largest firms*	8,529	91,057.5	85.4	91.8	73.8	86.5

# Firms operating anytime during the year.
Footnotes (*) are at end of table.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Department Stores   SIC Code 531

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982*	No. of Stores Operated, 1982**	Sales 1982 (mil. $)***	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	502	9,981	$98,750.2##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	178	178	905.1	35.5	52.2	1.7	3.6	0.9	1.4
Multi-unit organizations	324	9,803	97,845.1	64.5	47.5	98.3	96.4	99.1	98.6
Less than 10 stores	244	645	4,638.3	48.6	30.5	6.4	8.0	4.7	6.0
10 or more stores	80	9,158	93,206.9	16.0	17.0	91.7	88.4	94.4	92.6
50 or more stores	33	8,185	85,090.0	6.6	5.0	82.0	68.6	86.2	76.4

## Excludes $419,891,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982, 1977

	No. of Firms*		Percent of Total					
			Firms		Stores		Sales	
	1982	1977	1982	1977	1982	1977	1982	1977
Total	491	600#	100.0	100.0	100.0	100.0	100.0	100.0
Sales volume of firms:								
$100 mil. or more	67	79	13.6	13.2	88.9	83.0	94.3	91.8
$ 50 mil.-$99.9 mil.	32	32	6.5	5.3	3.6	5.1	2.4	2.9
$ 25 mil.-$49.9 mil.	33	39	6.7	6.5	2.1	3.2	1.1	1.9
$ 10 mil.-$24.9 mil.	70	81	14.3	13.5	2.0	3.2	1.1	1.7
Less than $10 mil.	289	369	58.9	61.5	3.4	5.4	1.1	1.7

# Firms operating anytime during the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982**	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977###	
			Stores	Sales	Stores	Sales
Annual sales total:						
Total	9,744	$ 97,376.2	100.0	100.0	100.0	100.0
$25 mil. or more	694	26,244.1	7.1	27.0	59.5	86.3
$ 5.0 mil.- $24.9 mil.	5,850	60,983.1	60.0	62.6		
$ 2.5 mil.- $ 4.9 mil.	2,277	8,467.1	23.3	8.7	33.3	12.4
Under $2.5 mil.	923	1,681.8	9.6	1.7	7.2	1.3

###According to the Census, 8,401 department stores were in operation the entire year 1977.

Footnotes are at end of table.

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Department Stores   SIC Code 531

(footnotes for previous tables)

* A firm is a business entity (company) that may consist of just one store or be the parent organization of many different stores. Included in department store "firms" are companies such as Federated Dept. Stores, Dayton Hudson Corp., May Department Stores, R.H. Macy, Associated Dry Goods, Carter Hawley Hale, etc. (Eleven firms were not in business the entire year).

** Each business location is counted as a separate store. Includes discount department stores and department store outlets of mail order chains as well as traditional department stores. For the first time, 1982 census of retail trade published reports included counts by type of department store operation (covering total operations, but not sales size, number of units or other measurements), as noted below. For Census Bureau definitions, see the INTRODUCTION.

	Stores	Sales*** Mil. $	Percent
Department stores, total	9,981	$99,170.2	100.0
Conventional	2,400	31,774.5	32.1
Discount or mass merchandising	5,764	38,798.8	39.1
National chain	1,817	28,596.9	28.8

*** Excludes leased department sales in 1982, but includes sales from catalog order desks. Consolidated department store sales, including leased departments, amounted to $107,162.8 million in 1982. In other words, leased department volume accounted for 7.4% of consolidated sales. In the sections covering Merchandise Line Sales, etc., in this Fact File, leased departments in all cases are not consolidated with kind-of-business data for the stores in which they are operated, but are treated by the Census Bureau as separate establishments.

Source: U.S. Bureau of the Census:
Census of Retail Trade, 1982, 1977

Store Type: Variety Stores (With Payroll)   SIC Code 533

In 1982, there were 4,506 variety store firms with payroll in the U.S., operating 10,989 stores, with sales totaling $8.1 billion. In 1977, there were 6,029 variety store firms with payroll in operation, and sales totaled $6.8 billion.

Most variety stores with payroll are operated by multi-unit organizations. Such firms (9.7% of the total firm count) accounted for 63% of the variety stores, and 89% of sales in this classification in 1982; 80% of the sales were concentrated among the 18 variety store firms that had 50 or more stores. The latter operated half of the stores.

On an individual store basis, most (61%) had an annual sales volume of less than $500,000 in 1982, but accounted for only 18.3% of total sales. Stores with a volume of $1.0 million or more accounted for 19% of the total store count and had a 61% share of sales.

Most variety stores are small operations, with 10 to 50 employees. In 1982, over 37% of the stores were in this employment-size group. They accounted for 37.4% of sales. Variety stores with 20 to 49 employees (15.5% of the total) had a 33.8% share of sales. However, stores with over 50 employees (5.2%) held a 30% share of sales.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Variety Stores (With Payroll) SIC Code 533

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	10,989	$ 8,090.2	100.0	100.0	100.0	100.0
4 largest firms	3,051	4,960.0	27.7	61.3	24.1	50.1
8 largest firms	4,364	5,831.7	39.7	72.1	34.2	65.3
20 largest firms	5,524	6,511.7	50.3	80.5	43.5	74.0
50 largest firms	5,982	6,803.2	54.4	84.1	50.1	79.7

# Firms operating anytime during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	4,506	10,989	$ 8,041.3##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	4,067	4,067	904.0	90.3	93.9	37.0	40.0	11.2	11.0
Multi-unit organizations	439	6,922	7,137.3	9.7	6.1	63.0	60.0	88.8	89.0
Less than 10 stores	387	812	362.1	8.6	4.9	7.4	6.8	4.5	4.6
10 or more stores	52	6,110	6,775.1	1.1	1.1	55.6	53.1	84.2	84.5
50 or more stores	18	5,501	6,408.4	0.4	0.4	50.1	47.0	79.7	79.4

##Excludes $48,917,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	4,243	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	31	0.7	53.9	83.5
$ 5.0 mil.-$ 9.9 mil.	18	0.4	1.9	1.5
$ 2.5 mil.-$ 4.9 mil.	36	0.8	2.1	1.6
$ 1.0 mil.-$2.49 mil.	147	3.5	2.8	2.6
Less than $1.0 mil.	4,011	94.5	39.3	10.8

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 9,253 firms in operation, including both those with payroll and those without paid employees. There were 6,029 firms with payroll in operation at the end of the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Variety Stores (With Payroll) SIC Code 533

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	10,437	$ 7,770.6	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	127	843.4	1.2	10.9	0.3	4.6
$ 2.5 mil.- $ 4.9 mil.	620	2,121.7	5.9	27.3	3.9	21.7
$ 1.0 mil.- $ 2.4 mil.	1,218	1,896.2	11.7	24.4	8.1	22.2
$ 0.5 mil.- $ 0.9 mil.	2,145	1,485.4	20.6	19.1	15.7	21.2
Less than $0.5 mil.	6,327	1,423.9	60.6	18.3	72.0	30.3

** The census showed a total of 13,153 stores with payroll operating the entire year and 15,907 including non-employer stores. The 2,754 variety stores without paid employees accounted for 17.3% of stores and 1.8% of sales. Comparable figures are not available for 1982.

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

Store Type: Miscellaneous General Merchandise Stores (With Payroll) SIC Code 539

Retailers in this classification (often called junior department stores) are generally small operations, with annual volume under $500,000, and operating just one store. However, the 50 largest firms, which operate junior department stores, held a 59% share of total sales generated by retailers in this classification which had paid employees--up from a 52% share in 1977.

Multi-unit firms, of which there were only 874 in 1982--10.3% of the firms--operated 42% of the miscellaneous general merchandise stores which garnered over 78% of total sales.

On an individual store basis, units with sales of $1.0 million or more in 1982 (20.1% of the store count) did over three-fourths of total business that year in this classification.

While miscellaneous general merchandise stores with more than 100 employees and those with less than 10 each accounted for 19% of sales. Those with less than 10 represented 70% of stores and had an 18.5% share of 1982 sales.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Miscellaneous General Merchandise Stores (With Payroll)
SIC Code 539

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total 1982 Stores	Percent of Total 1982 Sales	Percent of Total 1977 Stores	Percent of Total 1977 Sales
All firms#	13,175	$ 12,686.5	100.0	100.0	100.0	100.0
4 largest firms	561	3,362.5	4.3	26.5	4.0	22.2
8 largest firms	2,067	4,406.1	15.7	34.7	8.4	29.4
20 largest firms	2,859	6,147.4	21.7	48.5	18.1	40.6
50 largest firms	3,332	7,476.5	25.3	58.9	23.5	52.1

# Firms operating anytime during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total Firms 1982	Percent of Total Firms 1977	Percent of Total Stores 1982	Percent of Total Stores 1977	Percent of Total Sales 1982	Percent of Total Sales 1977
Total	8,510	13,175	$12,509.0##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	7,636	7,636	2,720.3	89.7	94.1	58.0	62.5	21.7	29.9
Multi-unit organizations	874	5,539	9,788.6	10.3	5.9	42.0	37.5	78.3	70.1
Less than 10 stores	815	1,776	3,062.3	9.5	5.3	13.4	11.4	24.5	23.5
10 or more stores	59	3,763	6,726.3	0.8	0.5	28.6	26.0	53.8	46.6
50 or more stores	13	2,768	5,138.5	0.2	0.1	21.0	19.3	41.1	30.4

## Excludes $177,603,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total Firms	Percent of Total Stores	Percent of Total Sales
Total	7,993	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	114	1.4	30.6	68.2
$ 5.0 mil.-$ 9.9 mil.	108	1.4	3.4	6.1
$ 2.5 mil.-$ 4.9 mil.	199	2.5	3.4	5.6
$ 1.0 mil.-$2.49 mil.	617	7.7	6.4	7.5
Less than $1.0 mil.	6,955	87.0	56.2	12.5

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 17,570 firms in operation, including both those with payroll and those without paid employees. There were 10,236 firms with payroll in operation at the end of the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Miscellaneous General Merchandise Stores (With Payroll)
SIC Code 539

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	12,403	$ 11,690.5	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	476	4,542.8	3.8	38.9	2.3	28.4
$ 2.5 mil.- $ 4.9 mil.	575	2,020.7	4.6	17.3	4.7	20.6
$ 1.0 mil.- $ 2.49 mil.	1,449	2,282.3	11.7	19.5	8.6	17.6
$ 0.5 mil.- $ 0.9 mil.	1,789	1,262.6	14.4	10.8	13.9	14.2
Under $0.5 mil.	8,114	1,582.1	65.4	13.5	70.5	19.2

** The census showed a total of 13,369 stores with payroll operating the entire year and 19,649 including non-employer stores. The 6,280 miscellaneous general merchandise stores without paid employees accounted for 32.0% of stores and 3.0% of sales. Comparable figures are not available for 1982.

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

Store Type: Men's & Boys' Wear (Clothing & Furnishings) Stores (With Payroll)
SIC Code 561

In 1982, there were 11,742 firms operating 17,480 men's and boys' wear specialty stores with payrolls and with total sales that year amounting to $7.7 billion. This compares with about 15,000 firms in this classification in 1977 with sales of $6.9 billion (current dollars).

The five-year span marked a period of consolidation. The 50 largest firms in this classification owned 17.5% of the men's specialty stores with payroll, compared with 5.3% in 1977, but sales share rose from 24.5% to only 26% in 1982. Multi-unit firms (14% of the 1982 total compared with about 9% in 1977) increased their share of stores from 34% to 42%, and their share of sales from 50% to 57%. (The different treatment of leased departments in 1982 is a factor in the shift in concentration. See INTRODUCTION, page 2).

Nine out of 10 men's specialty store firms (representing 63% of the 1982 store count covering operations with paid employees) had a total volume of less than $1.0 million in 1982, but these firms had a sales share of only 36.4%. The 1,172 firms that had a sales volume of $1.0 million or more in 1982 (10.5% of the firms) controlled 63.6% of 1982 sales.

Individual stores with a sales volume of $1.0 million or more in 1982--1,411 stores, or 8.5% of the total--accounted for 37.1% of men's specialty store (with payroll) sales volume, up from 27.4% of sales (current dollars) in 1977. Most men's wear stores, however, are small operations. In 1982, stores with less than $500,000 in annual volume accounted for 75% of the stores, but the share of sales was 27%. Eight out of 10 stores had fewer than 10 employees. These stores held a 49% share of sales. (Leased department operations, counted as individual stores in 1982, are a factor in these counts).

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Men's & Boys' Wear (Clothing & Furnishings) Stores (With Payroll)
SIC Code 561

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	17,480	$ 7,734.5	100.0	100.0	100.0	100.0
4 largest firms	986	736.0	5.6	9.5	1.7	8.6
8 largest firms	1,891	1,035.2	10.8	13.4	2.5	12.7
20 largest firms	2,366	1,495.1	13.5	19.3	4.0	18.9
50 largest firms	3,054	2,013.3	17.5	26.0	5.3	24.5

# Firms operating any time during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	11,742	17,480	$ 7,606.4##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	10,086	10,086	3,274.4	85.9	91.1	57.7	65.6	43.0	50.0
Multi-unit organizations	1,656	7,394	4,332.0	14.1	8.9	42.2	34.4	57.0	50.0
Less than 10 stores	1,561	3,494	2,125.3	13.3	8.2	19.9	17.8	27.9	23.6
10 or more stores	95	3,900	2,206.7	0.8	0.6	22.4	16.6	29.0	26.4
50 or more stores	15	2,465	1,097.7	0.1	0.1	14.1	9.8	14.4	15.4

##Excludes $128,153,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	11,197	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	73	0.7	19.6	30.3
$ 5.0 mil.-$ 9.9 mil.	84	0.8	3.5	7.8
$ 2.5 mil.-$ 4.9 mil.	209	1.9	4.7	9.6
$ 1.0 mil.-$2.49 mil.	806	7.2	9.3	16.0
Less than $1.0 mil.	10,025	89.5	62.9	36.4

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 16,908 firms in operation, including both those with payroll and those without paid employees. There were 14,868 firms with payroll in operation at the end of the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Men's & Boys' Wear (Clothing & Furnishings) Stores (With Payroll) SIC Code 561

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	16,688	$ 7,365.0	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	47	410.2	0.3	5.6	0.1	2.6
$ 2.5 mil.- $ 4.9 mil.	183	605.7	1.1	8.2	1.1	8.8
$ 1.0 mil.- $ 2.49 mil.	1,181	1,719.5	7.1	23.3	4.2	16.0
$ 0.5 mil.- $ 0.9 mil.	2,763	1,900.9	16.6	25.8	12.4	24.5
$ 0.25 mil.- $0.49 mil.	4,916	1,729.4	29.5	23.5	18.6	20.6
Less than $0.25 mil.	7,598	997.3	45.5	13.5	63.6	27.5

** The census showed a total of 18,614 stores with payroll operating the entire year and 20,349 including non-employer stores. The 1,735 men's & boys' wear stores without paid employees accounted for 8.5% of stores and 1.3% of sales. Comparable figures are not available for 1982. (Treatment of leased departments as separate stores in 1982 swells the data on smaller operations).

Note: Unless otherwise specified, store data covers establishments in operation at the end of the year.
For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

Store Type: Women's Wear Specialty Stores (All Types, including Ready-to-Wear Stores, Specialty Accessory Stores, Furriers) (With Payroll) SIC Codes 562, 563, 568

The number of companies or firms operating women's wear specialty stores with payroll (all types) was reported at 28,565 in 1982, compared with close to 30,000 in 1977. Sales (on a current dollar basis) amounted to about $22 billion in 1982, up from $13.3 billion in 1977, with inflation in this period a factor in the 64.9% sales gain. About 51,000 stores in this classification were operating in 1982, up from an estimated 46,000 in 1977.

The five-year period was marked by increasing concentration of specialty store business among large firms and big stores. In 1982, the 50 largest firms operated 24% of the women's specialty stores with payroll and controlled almost 45% of sales. Comparable figures in 1977 were about 13% and 33%, respectively. (The different treatment of leased departments in 1977 is a factor in the sales shift. See INTRODUCTION, page 2).

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Women's Wear Specialty Stores (All Types, including Ready-to-Wear Stores, Specialty Accessory Stores, Furriers) (With Payroll) SIC Codes 562, 563, 568

Multi-unit firms increased from 8.3% of the total to 12.7%. Their share of stores went up from about 39% to 51%; their share of sales jumped from 64% to 73%. The 62 firms that operated 50 or more specialty stores in 1982 (0.2% of the firms), had a 40.2% share of sales, while operating about 28% of the specialty stores with payroll.

On an individual store basis, most reported women's specialty operations with payroll are small operations. Those with sales of $250,000 or less in 1982 represented over half (53.4%) of the count, but accounted for only 15% of sales. Almost eight out of 10 stores had fewer than 10 employees, but their sales share was 37.5%. Included in these 1982 counts are an undetermined number of leased department operations now counted as single stores. Women's specialty stores with sales of $1.0 million or more (8.9% of the total count) had a 43% share of sales.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	50,961	$21,989.3	100.0	100.0	100.0	100.0
4 largest firms	4,386	4,237.8	8.6	19.3	2.4	11.0
8 largest firms	5,409	5,719.1	10.6	26.0	3.5	15.7
20 largest firms	8,605	7,807.8	16.9	35.5	6.9	24.2
50 largest firms	12,321	9,800.7	24.2	44.6	12.7	33.3

# Firms operating anytime during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	28,565	50,961	$21,716.4##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	24,946	24,946	5,844.5	87.3	91.7	49.0	61.3	26.9	36.4
Multi-unit organizations	3,619	26,015	15,871.9	12.7	8.3	51.0	38.7	73.1	63.6
Less than 10 stores	3,376	8,171	3,935.2	11.8	7.6	16.0	16.2	18.1	20.8
10 or more stores	243	17,844	11,936.7	0.9	0.7	35.0	22.5	55.0	42.8
50 or more stores	62	14,207	8,737.7	0.2	0.2	27.9	15.2	40.2	25.2

##Excludes $272,914,000 in sales of firms not in business at end of year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Women's Wear Specialty Stores (All Types, Including Ready-to-Wear Stores, Specialty Accessory Stores, Furriers) (With Payroll) SIC Codes 562, 563, 568

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	26,799	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	169	0.6	32.7	55.9
$ 5.0 mil.-$ 9.9 mil.	161	0.6	3.0	5.3
$ 2.5 mil.-$ 4.9 mil.	379	1.4	3.2	6.1
$ 1.0 mil.-$2.49 mil.	1,268	4.7	5.9	8.9
Less than $1.0 mil.	24,822	92.6	55.2	23.8

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 38,839 firms in operation, including both those with payroll and those without paid employees. There were 29,641 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	47,903	$20,668.0	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	205	2,078.7	0.4	10.1	1.5	18.8
$ 2.5 mil.- $ 4.9 mil.	430	1,417.5	0.9	6.9		
$ 1.0 mil.- $2.49 mil.	3,634	5,298.8	7.6	25.6	4.0	16.7
$ 0.5 mil.- $ 0.9 mil.	7,228	5,024.4	15.1	24.3	10.5	22.7
$ 0.25 mil.- $0.49 mil.	10,792	3,810.7	22.5	18.4	11.9	14.2
Less than $0.25 mil.	25,614	3,037.9	53.4	14.7	72.1	27.6

** The 1977 census showed a total of 38,901 stores with payroll operating the entire year and 46,536 including non-employer stores. The 7,635 women's wear specialty stores without paid employees accounted for 16.4% of stores and 1.9% of sales. Comparable figures are not available for 1982. (Treatment of leased departments as separate stores in 1982 swells the data on smaller operations).

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

The women's wear store category includes 24,084 firms operating ready-to-wear stores and 4,573 firms operating accessory and specialty stores and furriers.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Women's Ready-to-Wear Stores (With Payroll) SIC Code 562 (Part)

According to the 1982 census, there were 24,084 firms operating 44,163 women's ready-to-wear stores (primarily selling coats, suits, dresses, pants) throughout the country, with sales totaling $20.2 billion. This compares with over 26,000 firms in this classification in 1977, and sales amounting to $12.3 billion (current dollar basis).

In the five-year period, there was a marked shift in sales concentration to the larger firms. The top 50 in 1982 held a 48% share of women's ready-to-wear store sales volume among stores with paid employees; their share of stores amounted to 27.1%. In 1977, the top 50 firms had about 14% of the stores and a 35% share of sales. The different treatment of leased departments is an important factor in the shift of sales concentration to larger firms in 1982. (See INTRODUCTION, page 2).

Multi-unit women's ready-to-wear retailer operations increased from 8.4% of the firms in 1977 to 13.2% in 1982. Their share of stores rose from 39% to 53%; their sales share, from 65% in 1977 to 75% in 1982. The 207 firms with 10 or more stores in 1982 controlled over half of the total sales volume among specialty stores with payroll.

On an individual store basis, those with annual volume of $1.0 million or more in 1982 (9.7%) held a 44% share of total sales in this store classification. Stores of this size in 1977 (5.8% of the total count) held a 36% share of sales.

Inclusion of leased department operations as separate stores in 1982 has an undetermined but real effect on counts involving smaller specialty store operations. Ready-to-wear stores with fewer than 10 employees represented 77% of the store count and held a 43% share of sales. Half of the store/leased operation count of ready-to-wear stores in 1982 were in the under-$250,00 a year volume group, with a share of only 13.1% of sales.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	44,163	$20,248.9	100.0	100.0	100.0	100.0
4 largest firms	4,382	4,230.7	9.9	20.9	2.6	11.4
8 largest firms	5,402	5,710.8	12.2	28.2	3.8	16.5
20 largest firms	8,553	7,789.5	19.4	38.5	7.6	25.6
50 largest firms	11,964	9,679.8	27.1	47.8	13.8	35.1

# Firms operating anytime during the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Women's Ready-to-Wear Stores (With Payroll) SIC Code 562 (Part)

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	24,084	44,163	$20,007.8##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	20,898	20,898	4,934.5	86.8	91.6	47.3	60.7	24.7	35.0
Multi-unit organizations	3,186	23,265	15,073.3	13.2	8.4	52.7	39.3	75.3	65.0
Less than 10 stores	2,979	7,147	4,727.5	12.3	7.7	16.2	16.2	23.6	21.0
10 or more stores	207	16,118	10,345.8	0.9	0.7	36.4	23.1	51.7	44.0
50 or more stores	55	13,044	na	0.2	0.2	29.5	15.5	na	26.0

na - not available

##Excludes $241,130,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	22,586	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	156	0.7	34.8	58.5
$ 5.0 mil.-$ 9.9 mil.	146	0.6	2.9	5.2
$ 2.5 mil.-$ 4.9 mil.	337	1.5	3.3	5.9
$ 1.0 mil.-$2.49 mil.	1,099	4.9	5.6	8.3
Less than $1.0 mil.	20,848	92.3	53.4	22.1

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 31,612 firms in operation, including both those with payroll and those without paid employees. There were 26,130 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	41,463	$19,022.3	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	194	1,996.5	0.5	10.5	0.3	8.3
$ 2.5 mil.- $ 4.9 mil.	385	1,270.3	0.9	6.7	1.4	11.3
$ 1.0 mil.- $2.49 mil.	3,458	5,033.4	8.3	26.5	4.1	16.6
$ 0.5 mil.- $ 0.9 mil.	6,805	4,736.3	16.4	24.9	11.3	23.1
$ 0.25 mil.- $0.49 mil.	9,872	3,496.2	23.8	18.4	12.6	14.3
Less than $0.25 mil	20,749	2,489.6	50.0	13.1	70.3	26.4

**The census showed a total of 34,550 stores with payroll operating the entire year and 39,047 including non-employer stores. The 4,497 women's ready-to-wear stores without paid employees accounted for 11.5% of stores and 1.4% of sales. Comparable figures are not available for 1982. Treatment of leased departments as separate stores in 1982 swells the data on smaller operations.)

Note: For information on store classifications, on comparability of 1982 and 1977 figures, and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Family Clothing Stores (With Payroll) SIC Code 565

The 1982 Census counted 10,485 firms operating family clothing stores (with payroll) in that year, operating 17,859 stores, with a sales volume of $13.4 billion. Over half of the 1982 sales volume was concentrated among the 50 largest firms (which operated 4,043 stores, or 52.5% of the total store count). In 1977, the 50 top firms in this classification operated 19.5% of the stores and had a 47% share of sales.

Multi-unit firms have increased their share of sales in this store classification from 68.3% in 1977 to 77.5% in 1982. Their share of stores in this period went up from 41.7% to 51.6%. There were only 121 family clothing store firms with 10 or more stores in 1982, but they operated over 5,000 stores (30.5% of the total) and had a 54% piece of the sales pie.

On a store basis, the 3,167 stores (18.7% of the total) which had an annual volume of $1.0 million or more in 1982 chalked up a 65% share of sales. Stores of this size in 1977 accounted for 12.9% of the stores, or 53% of sales.

Smaller stores, with less than 10 employees, accounted for almost 65% of family clothing stores in 1982, but only a 21.5% share of sales. Stores with a volume under $500,000 in 1982 (62% of the stores) had a 16.6% share of sales.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	17,859	$13,451.0	100.0	100.0	100.0	100.0
4 largest firms	1,846	3,199.4	10.3	23.7	8.7	23.6
8 largest firms	2,419	4,345.5	13.5	32.3	12.3	29.9
20 largest firms	3,281	5,834.8	18.3	43.4	15.0	38.5
50 largest firms	4,043	7,064.6	22.6	52.5	19.5	46.9

# Firms operating anytime during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms, 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	10,485	17,859	$13,307.4##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	8,641	8,641	2,988.2	82.4	90.5	48.4	58.3	22.5	31.7
Multi-unit organizations	1,844	9,218	10,319.2	17.6	9.5	51.6	41.7	77.5	68.3
Less than 10 stores	1,815	3,796	3,178.1	16.4	8.7	21.1	17.5	23.8	23.9
10 or more stores	121	5,449	7,140.9	1.2	0.8	30.5	24.2	53.7	44.4
50 or more stores	20	3,628	5,348.2	0.2	na	20.3	na	40.2	na

na not available

##Excludes $143,616,000 in sales of firms not in business at end of year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Family Clothing Stores (With Payroll) SIC Code 565

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	9,947	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	120	1.2	28.1	61.9
$ 5.0 mil.-$ 9.9 mil.	114	1.1	4.4	6.1
$ 2.5 mil.-$ 4.9 mil.	238	2.4	4.5	6.3
$ 1.0 mil.-$2.49 mil.	774	7.8	8.0	8.9
Less than $1.0 mil.	8,701	87.5	55.0	16.8

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 15,873 firms in operation, including both those with payroll and those without paid employees. There were 10,267 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	16,914	$12,682.3	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	277	2,479.2	1.6	19.5	0.6	8.9
$ 2.5 mil.- $ 4.9 mil.	689	2,430.2	4.1	19.2	3.7	21.1
$ 1.0 mil.- $ 2.49 mil.	2,201	3,371.6	13.0	26.6	8.6	23.0
$ 0.5 mil.- $ 0.99 mil.	3,264	2,298.3	19.3	18.1	15.1	20.5
$ 0.25 mil.-$0.49 mil.	3,576	1,283.7	21.1	10.1	15.9	11.8
Under $0.25 million	6,907	819.3	40.8	6.5	56.1	14.7

** The census showed a total of 14,384 stores with payroll operating the entire year and 18,841 including non-employer stores. The 4,457 family clothing stores without paid employees accounted for 23.7% of stores and 1.8% of sales. Comparable figures are not available for 1982.

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Children's & Infants' Wear Stores (With Payroll) SIC Code 564

Children's and infants' wear specialty stores are predominantly single-unit operations with an annual sales volume under $500,000. The 50 largest firms in this classification operated 462 stores (8.7% of the children's specialty stores with payroll) and garnered a 26% share of total sales. This was up from 4.6% share of stores and 16.8% share of sales accounted for by the top 50 firms in 1977. (See INTRODUCTION, page 2, regarding the different treatment of leased departments, which affects comparability of published 1982 and 1977 data).

Only 465 firms (10.4% of the 1982 total) operate more than one children's/infants' wear store, but they operated 25% of all stores in this classification (with payroll) and racked up over 41% of total sales that year.

In 1982, 181 firms operating children's/infants' wear stores had sales of $1.0 million or more. They represented 4.3% of the firms, 15.3% of the stores, and accounted for 41.8% of sales.

On a store basis, only 166 stores (out of a total of 4,943 in 1982) had a volume of $1.0 million or more. Their sales share has not been published by the Census Bureau in order to avoid disclosure of individual operations, but it is in excess of 20%, compared with the 7.7% sales share held by stores of this size in 1977.

A majority of children's and infants' wear stores employed less than 10 employees in 1982 (86.1%) and held a 57.6% share of sales. It should be noted that the inclusion in these figures of leased department operations as separate stores is a factor of undetermined weight in these counts.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	5,325	$ 1,356.0	100.0	100.0	100.0	100.0
4 largest firms	244	173.5	4.6	12.8	1.0	4.1
8 largest firms	278	209.5	5.2	15.4	1.3	5.9
20 largest firms	352	268.9	6.6	19.8	2.3	10.0
50 largest firms	462	356.1	8.7	26.3	4.6	16.8

# Firms operating anytime during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms, 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	4,450	5,325	$ 1,312.2##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	3,985	3,985	769.4	89.6	94.6	74.8	85.4	58.6	74.8
Multi-unit organizations	465	1,340	542.8	10.4	5.4	25.2	14.6	41.3	25.2
Less than 10 stores	455	1,006	331.6	10.3	5.4	18.9	13.8	25.3	na
10 or more stores	10	334	211.3	0.2	###	6.3	0.8	16.1	na
50 or more stores	3	224	159.8	0.1	###	4.2	—	12.2	—

na not available
## Excludes $43,794,000 in sales of firms not in business at end of year.
###Less than 0.1%.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Children's & Infants' Wear Stores (With Payroll) SIC Code 564

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms, 1982	Percent of Total		
		Firms	Stores	Sales
Total	4,145	100.0	100.0	100.0
Sales volume of firms:				
$ 5.0 mil. or more	14	0.3	6.6	18.7
$ 2.5 mil.-$ 4.9 mil.	27	0.7	2.3	7.0
$ 1.0 mil.-$2.49 mil.	140	3.3	6.3	16.1
Less than $1.0 mil.	3,964	95.6	84.7	58.2

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 4,802 firms in operation, including both those with payroll and those without paid employees. There were 3,915 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	4,943	$ 1,254.9	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	4	na	0.1	na	0.2	3.3
$ 2.5 mil.- $ 4.9 mil.	9	27.8	0.2	2.2		
$ 1.0 mil.- $2.49 mil.	153	207.9	3.1	16.6	0.6	4.4
$ 0.5 mil.- $ 0.9 mil.	473	319.6	9.6	25.5	4.2	16.1
$ 0.25 mil.- $0.49 mil.	861	296.4	17.4	23.6	9.3	19.5
Less than $0.25 mil.	3,443	na	69.7	na	85.7	56.7

na not available

** The census showed a total of 3,736 stores with payroll operating the entire year and 4,403 including non-employer stores. The 667 children's and infant's wear stores without paid employees accounted for 15.1% of stores and 3.4% of sales. Comparable figures are not available for 1982. (The treatment of leased departments as separate stores in 1982 swells the data on smaller operations).

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Shoe Stores (All Types With Payroll) SIC Code 566

According to the 1982 census of retail trade, 12,449 firms operating 36,277 shoe stores with payroll were in business that year. This compares with 11,544 firms in operation in 1977, and a total of 21,732 shoe stores in operation as originally reported, or 24,450 when adjusted for the change made in 1982 in the treatment of leased deparmtents (see INTRODUCTION, page 2).

Of the total shoe store count in 1982, family shoe stores numbered 23,298 (64.2% of the total); women's shoe stores, 7,832 (21.6%); men's shoe stores, 4,153 (11.4%); children's/juvenile's shoe stores, 994 (2.7%).

Total sales of shoe stores in 1982 amounted to $11.3 billion, gaining 63% over the 1977 total (adjusted for comparability, but on a current dollar basis). Of the 1982 total, sales of family shoe stores accounted for 64.9%; women's shoe stores, 23.3%; men's shoe stores, 9.9%; children's/juveniles' shoe stores, 1.9%.

Shoe store business is highly concentrated among the largest firms--to a much greater extent in 1982 than noted five years earlier. The latest count showed the top 50 firms accounting for over half (53%) of the shoe stores and chalking up 56.3% of sales. In 1977, the top 50 firms operated 39% of the stores and garnered about 50% of shoe store sales.

The 144 shoe store firms operating 10 or more stores in 1982 operated over 58% of total stores with payroll and had a 62% share of total sales. This was up from 44% and 53%, respectively, in 1977.

Firms with a sales volume of $10.0 million or more in 1982, numbering 61, operated 55% of the shoe stores with payroll and controlled over 58% of sales. On an individual store basis, shoe stores with a total sales volume of $1.0 million or more (921, or 2.7% of the 1982 total) accounted for 13.9% of total shoe store (with payroll) volume as compared with 6.9% of sales accrued to this volume group in 1977 (current dollar basis).

On an individual store basis, small shoe stores with less than 10 employees were the norm (90% of stores; 79% of sales). Shoe stores with a volume under $500,000 in 1982 were reported to represent 85.5% of the shoe stores with payroll and to hold a 61% share of sales. However, leased shoe departments (numbers not available at this time) were treated as separate stores in 1982, and this swells the small-store counts.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	36,277	$11,275.4	100.0	100.0	100.0	100.0
4 largest firms	8,462	3,079.1	23.3	27.3	15.2	23.4
8 largest firms	12,557	4,244.2	34.6	37.6	24.0	31.1
20 largest firms	17,517	5,661.1	48.3	50.2	33.7	43.1
50 largest firms	19,271	6,345.0	53.1	56.3	39.2	49.8

# Firms operating anytime during the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Shoe Stores Total (All Types With Payroll) SIC Code 566

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms, 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	12,449	36,277	$11,134.7##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	10,551	10,551	2,591.3	84.8	98.6	29.1	42.3	23.3	30.8
Multi-unit organizations	1,898	25,726	8,543.4	15.2	10.4	70.9	57.7	76.7	69.2
Less than 10 stores	1,754	4,565	1,723.3	14.1	9.6	12.6	14.0	15.4	16.2
10 or more stores	144	21,161	6,820.1	1.0	0.9	58.3	43.7	62.2	53.0
50 or more stores	37	19,099	6,051.1	0.3	0.3	52.7	37.4	54.3	45.8

##Excludes $140,648,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	11,744	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	61	0.5	55.0	58.5
$ 5.0 mil.-$ 9.9 mil.	73	0.6	2.9	4.5
$ 2.5 mil.-$ 4.9 mil.	141	1.2	3.0	4.6
$ 1.0 mil.-$2.49 mil.	595	5.1	4.7	8.2
Less than $1.0 mil.	10,874	92.6	34.4	24.2

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 14,985 firms in operation, including both those with payroll and those without paid employees. There were 11,544 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	34,080	$10,622.9	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	18	132.5	0.2	1.2	0.2	1.9
$ 2.5 mil.- $ 4.9 mil.	60	194.5		1.8		
$ 1.0 mil.- $2.49 mil.	843	1,158.3	2.5	10.9	0.9	5.0
$ 0.5 mil.- $0.99 mil.	4,010	2,668.3	11.8	25.1	6.7	18.8
Under $0.5 million	29,149	6,469.3	85.5	60.9	92.2	74.3

(see footnote on next page)

Store Type: Shoe Stores Total (All Types With Payroll) SIC Code 566

(footnote from preceding tables)

** The census showed a total of 21,732 stores with payroll operating the entire year and 24,712 including non-employer stores. The 2,980 shoe stores without employees accounted for 12.1% of stores and 2.2% of sales. Comparable figures are not available for 1982. (Treatment of leased departments as separate stores in 1982 is an important factor in the data on smaller operations).

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

The shoe store classification includes 1,099 firms operating men's shoe stores, 2,980 operating women's, 589 operating children's & juveniles' and 8,140 operating family shoe stores in 1982. See page 6 for number of shoe stores and sales by store type.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

Store Type: Jewelry Stores (With Payroll) SIC Code 5944

In 1982, according to the census, there were 16,164 firms operating 22,786 jewelry stores with payroll, with a total volume close to $8.4 billion. This represented an 8.9% gain in store count compared with 1977, while sales, on a current dollar basis, were up 57.8% (not adjusted for inflation).

Sales have become more concentrated among large firms and larger jewelry stores. In 1982, the 50 largest firms were reported to be operating 17.5% of the stores, while registering a 32.2% share of sales. Comparable figures in 1977 were 13.0% and 27.2%, respectively. (See INTRODUCTION, page 2, regarding the different treatment of leased departments in 1982, which affects comparability with 1977 published data).

Single-store firms no longer dominate the market. In 1982, firms operating more than one jewelry store with payroll increased their share of sales to 53.3%, from the 44.8% share held by multi-unit firms in 1977. Chains of 10 or more stores controlled 31.5% of sales in 1982, up from 23.4% in 1977.

In 1982, 55 jewelry store firms had a volume of $10.0 million. These firms operated 18.3% of the jewelry stores and controlled almost 34% of sales.

On an individual store basis, the 1,431 jewelry stores that had sales of $1.0 million or more in 1982--6.5% of the stores--had a 35.0% share of sales. In 1977, stores of this size represented 3.5% of the store count and racked up 25.3% of sales.

With over 85% of total store count, jewelry stores with less than 10 employees captured 56% of sales in 1982. Those with 100 or more employees represented 0.1% of stores and 2.8% of sales. (Again, it should be noted that the treatment of leased departments as separate stores is an important factor in the data on smaller stores for 1982).

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Jewelry Stores (With Payroll) SIC Code 5944

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total 1982 Stores	Percent of Total 1982 Sales	Percent of Total 1977 Stores	Percent of Total 1977 Sales
All firms#	22,786	$ 8,352.4	100.0	100.0	100.0	100.0
4 largest firms	2,298	1,420.4	10.1	17.0	6.7	13.4
8 largest firms	2,547	1,731.4	11.2	20.7	8.7	17.0
20 largest firms	3,292	2,171.6	14.4	26.0	10.8	22.0
50 largest firms	3,993	2,686.6	17.5	32.2	13.0	27.2

# Covers firms operating any time during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms, 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total Firms 1982	Percent of Total Firms 1977	Percent of Total Stores 1982	Percent of Total Stores 1977	Percent of Total Sales 1982	Percent of Total Sales 1977
Total	16,164	22,786	$ 8,238.4##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	14,812	14,812	3,849.8	91.6	94.6	65.0	73.6	46.7	55.2
Multi-unit organizations	1,352	7,974	4,388.6	8.4	5.4	35.0	26.4	53.3	44.8
Less than 10 stores	1,270	3,089	1,820.8	7.8	5.0	13.5	11.7	21.9	21.4
10 or more stores	82	4,885	2,585.8	0.5	0.4	21.4	14.7	31.5	23.4
50 or more stores	18	3,585	1,842.5	0.1	0.2	15.7	9.6	22.4	15.6

##Excludes $114,093,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total Firms	Percent of Total Stores	Percent of Total Sales
Total	15,465	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	55	0.4	18.3	33.6
$ 5.0 mil.-$ 9.9 mil.	86	0.6	3.7	7.1
$ 2.5 mil.-$ 4.9 mil.	182	1.2	3.1	7.6
$ 1.0 mil.-$2.49 mil.	744	4.8	6.1	13.4
Less than $1.0 mil.	14,398	93.1	68.7	38.4

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 29,739 firms in operation, including both those with payroll and those without paid employees. There were 15,632 firms with payroll in operation at the end of the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Jewelry Stores (With Payroll) SIC Code 5944

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	21,794	$ 8,008.7	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	51	505.8	0.2	6.3	0.1	4.5
$ 2.5 mil.- $ 4.9 mil.	178	602.9	0.8	7.5	0.8	8.0
$ 1.0 mil.- $ 2.49 mil.	1,202	1,694.8	5.5	21.2	2.6	12.8
$ 0.5 mil.- $ 0.99 mil.	2,909	1,978.9	13.3	24.7	8.3	20.3
$ 0.25 mil.- $0.49 mil.	5,066	1,800.6	23.2	22.5	13.6	19.1
Under $0.25 million	12,388	1,425.7	56.8	17.8	74.6	35.3

** The census showed a total of 17,153 stores with payroll operating the entire year and 29,743 including non-employer stores. The 12,230 jewelry stores without paid employees accounted for 41.1% of stores and 7.0% of sales. Comparable figures are not available for 1982. (The treatment of leased departments as separate stores in 1982 has an undetermined effect on smaller store data.)

Note: For information on store classifications, on comparability of 1982 and 1977 figures, and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

Store Type: Sewing, Needlework, Piece Goods Stores (With Payroll) SIC Code 5949

A total of 9,774 sewing, needlework, piece goods stores (with payroll) were counted in the 1982 census, with sales of $2.5 billion. While the number of stores registered a decline compared with 1977 (-4%), sales, on a current dollar basis, were up about 34% in the five year period.

Over half of sales (54%) were controlled by the 50 largest firms operating sewing, needlework, piece goods stores, although they operated only 26% of the stores. About 50% of the 1982 sales were registered by the 30 firms which operated 10 or more stores compared with the 45% share of sales held by firms of this size in 1977.

Individual stores with a volume of less than $250,000 (65% of the stores with payroll) in 1982 held only a 24% share of sales compared with the 67% share garnered by stores of this size in 1977. Stores with a volume of $1.0 million or more in 1982 (3.3% of the stores) chalked up 19.1% of sales. Comparable percentages in 1977 (current dollar basis) were 1.4% and 10.7%, respectively.

Smaller stores with less than 10 employees accounted for 78% of stores and 45% of sales in 1982 while those with 50 or more employees had 0.4% of stores and 3.5% of sales.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Sewing, Needlework, Piece Good Stores (With Payroll)
SIC Code 5949

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	9,774	$ 2,494.7	100.0	100.0	100.0	100.0
4 largest firms	1,735	774.9	17.8	31.1	13.4	27.7
8 largest firms	2,035	1,038.7	20.8	41.6	16.3	35.5
20 largest firms	2,324	1,204.6	23.8	48.3	20.7	42.8
50 largest firms	2,560	1,341.4	26.2	53.8	24.6	49.2

# Covers firms operating anytime during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms, 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	6,678	9,774	$ 2,448.6##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	6,234	6,234	855.3	93.4	94.7	63.8	64.8	34.9	40.0
Multi-unit organizations	444	3,540	1,593.2	6.6	5.3	36.2	35.2	65.1	60.0
Less than 10 stores	414	1,023	375.2	6.2	4.7	10.5	10.5	15.3	15.0
10 or more stores	30	2,517	1,218.0	0.4	0.6	25.7	24.7	49.7	45.0
50 or more stores	7	1,993	979.4	0.1	0.2	20.3	18.9	40.0	37.9

##Excludes $46,110,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	6,215	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	16	0.3	24.4	48.4
$ 5.0 mil.-$ 9.9 mil.	13	0.2	1.6	3.7
$ 2.5 mil.-$ 4.9 mil.	38	0.6	2.4	5.3
$ 1.0 mil.-$2.49 mil.	137	2.2	4.2	8.5
$ 0.5 mil.-$ 0.9 mil.	279	4.5	4.3	7.9
Less than $0.5 mil.	5,732	92.2	63.1	26.2

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 15,876 firms in operation, including both those with payroll and those without paid employees. There were 6,883 firms with payroll in operation at the end of the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Sewing, Needlework, Piece Good Stores (With Payroll)
SIC Code 5949

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	9,199	$ 2,383.7	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	--	--	--	--	--	--
$ 2.5 mil.- $ 4.9 mil.	21	69.7	0.2	2.9	0.2	2.8
$ 1.0 mil.- $ 2.49 mil.	282	386.7	3.1	16.2	1.2	7.9
$ 0.5 mil.- $ 0.99 mil.	1,050	702.9	11.4	29.5	7.0	2.5
$ 0.25 mil.- $0.49 mil.	1,881	661.2	20.4	27.7	10.1	19.8
Under $0.25 million	5,965	563.2	64.8	23.6	81.5	67.0

** The census showed a total of 8,750 stores with payroll operating the entire year and 16,340 including non-employer stores. The 7,590 sewing, needlework and piece goods stores without paid employees accounted for 46.5% of stores and 7.2% of sales. Comparable figures are not available for 1982.

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

Store Type: Hobby, Toy & Game Shops (With Payroll) SIC Code 5945

In 1982, the census of retail trade counted 5,895 firms operating 7,691 stores with payroll classified as hobby, toy or game shops. Sales in that year were reported at about $3.2 billion. In 1977, there were 6,615 stores with payroll in this classification, operating anytime during the year, with sales totaling $1.5 billion.

Hobby, toy and game shop business is highly concentrated among large firms. In 1982, the 50 largest held a 66% share of sales, while operating 18% of the stores with payroll. Figures for 1977 were 54.5% and 15.2%, respectively. (See INTRODUCTION, page 2, regarding treatment of leased departments, which affects comparability in published figures).

Almost three-quarters of the sales volume in this classification is in the multi-unit, or chain organizations. Those firms operating more than one store held a 74% share of sales in 1982; those operating 10 or more held a share of about 62%, up from 45.1% in 1977.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Hobby, Toy & Game Shops (With Payroll) SIC Code 5945

There were 132 stores in 1982 which had an annual volume of $5.0 million or more. These stores did almost one-third of total sales registered by toy stores, etc., with payroll. This was a tremendous jump over the 4.8% share of sales held by stores with a volume of $5.0 million or more in 1977.

With only 5.4% of store units, hobby, toy & game shops with 20 or more employees garnered the lion's share of sales, 53.0%. Small stores with less than 10 employees had 86% of stores and 33% of sales. (Leased toy departments in 1982 were counted as separate stores, which has some impact--of undetermined extent--on smaller store counts for 1982).

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	7,691	$ 3,237.6	100.0	100.0	100.0	100.0
4 largest firms	701	1,655.1	9.1	51.1	2.8	30.5
8 largest firms	912	1,790.8	11.9	55.3	9.0	38.1
20 largest firms	1,158	1,948.2	15.1	60.2	12.3	46.4
50 largest firms	1,328	2,134.7	18.0	65.9	15.2	54.5

# Covers firms operating anytime during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms, 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	5,895	7,691	$ 3,185.9##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	5,495	5,495	828.0	93.2	95.3	71.4	75.7	26.0	38.0
Multi-unit organizations	400	2,196	2,357.9	6.8	4.7	28.6	24.3	74.0	62.0
Less than 10 stores	371	852	388.4	6.3	4.4	11.1	11.1	12.2	16.9
10 or more stores	29	1,344	1,969.5	0.5	0.3	17.4	13.2	61.8	45.1
50 or more stores	7	943	na	0.1	na	12.3	7.6	na	26.2

na not available
##Excludes $51,751,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	5,426	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	21	0.4	16.2	62.3
$ 5.0 mil.-$ 9.9 mil.	19	0.4	1.6	4.2
$ 2.5 mil.-$ 4.9 mil.	37	0.7	2.7	4.0
$ 1.0 mil.-$2.49 mil.	130	2.4	3.6	6.5
$ 0.5 mil.-$ 0.9 mil.	282	5.2	5.6	6.1
Less than $0.5 mil.	4,937	91.0	70.3	16.9

(footnote on next page)

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Hobby, Toy & Game Shops (With Payroll) SIC Code 5945

(footnote from preceding table)

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 17,194 firms in operation, including both those with payroll and those without paid employees. There were 5,221 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	7,120	$ 3,043.8	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	132	999.1	1.9	32.8	0.2	4.8
$ 2.5 mil.- $ 4.9 mil.	146	507.7	2.1	16.7	2.6	30.1
$ 1.0 mil.- $ 2.49 mil.	200	320.5	2.8	10.5	2.2	12.5
$ 0.5 mil.- $ 0.99 mil.	640	427.8	9.0	14.1	4.6	11.6
$ 0.25 mil.- $0.49 mil.	993	359.2	13.9	11.8	8.3	12.2
Under $0.25 million	5,009	429.5	70.4	14.1	82.1	28.8

** The census showed a total of 5,515 stores with payroll operating the entire year and 15,267 including non-employer stores. The 9,752 hobby, toy and game stores without paid employees accounted for 63.9% of stores and 10.9% of sales. Comparable figures are not available for 1982.

Note: For information on store classifications, on comparability of 1982 and 1977 figures, and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

Store Type: Sporting Goods Stores (General Line & Specialty Line Total (With Payroll) SIC Code 5941

As explained in the INTRODUCTION to this Fact File, in 1982 the census of retail trade treated leased departments as separate retail establishments, classified according to type of merchandise. In earlier censuses, leased department data was incorporated in figures covering the stores in which these departments were operated (the lessor store).

It develops that this change has had a major impact on 1982 data covering general line sporting goods stores, making valid comparisons with 1977 census findings of doubtful value. They exaggerate the growth in the number of general line sporting goods store, while diminishing the sporting goods business reported in general merchandise stores (the primary type of lessor store).

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Sporting Goods Stores (General Line & Specialty Line)
Total (With Payroll) SIC Code 5941

The U.S. Census Bureau has issued the following supplemental information for 1982: a total of 2,017 leased departments, re-classified as general line sporting goods stores, were operated by two firms. These operations had a combined total of $1,060.5 million in sales (24.2% of the $4,377.5 million sales total reported for general line sporting goods stores in 1982). Through trade information, one of these operations can be identified as K-mart Sports Corp. (which leased the departments from K-mart Enterprises, operating some 1,800 departments in 1982 (but which is no longer in operation).

The effect of the change in methodology which included such operations as separate sporting goods stores is seen in the following census data. In 1982, the Bureau reported a total of 15,907 sporting goods firms, including 5,928 firms operating 9,252 general line sporting goods stores with payroll and 10,021 firms operating 10,900 specialty line sporting goods stores (including bicycle shops) with payroll.

In 1977, when leased departments were not counted as separate stores, the census reported a total of 15,632 firms with payroll, including 7,865 general line sporting goods firms operating 7,865 stores; 8,664 specialty line sporting goods firms operating 9,282 stores. (Store counts are for those in operation anytime during the year).

The increase in the number of general line sporting goods stores, from 7,028 in 1977 to 9,252 in 1982 is to a large extent attributed to the inclusion of leased departments, and reflects a temporary situation in the retail market. In the following tables, some data has been shown for 1977 in order to give a basic pattern, to the extent possible, in the profile of the market at that time based on the different treatment of leased departments.

Store Definitions

GENERAL LINE SPORTING GOODS STORES (SIC 5941 part): Stores primarily selling a general line of sporting goods and equipment for hunting, camping, fishing, skiing, riding, tennis, golf and other sports. Also gymnasium and other equipment.

SPECIALTY LINE SPORTING GOODS STORES (SIC 5941 part): Stores specializing in a maximum of four lines of sporting goods and equipment such as guns, bicycles, trophies, skiing, golfing, bowling and billiards equipment. (Bicycle shops represent a substantial portion of counts involving specialty line sporting goods stores without payroll--reported in 1977, but not in 1982).

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Sporting Goods Stores (General Line & Specialty Line)
Total (With Payroll) SIC Code 5941

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	20,152	$ 7,514.9	100.0	100.0	100.0	100.0
4 largest firms	2,290	1,389.4	11.4	18.4	1.1	7.6
8 largest firms	2,377	1,589.8	11.8	21.2	1.3	9.8
20 largest firms	2,552	1,865.6	12.7	24.8	1.8	13.4
50 largest firms	2,757	2,145.6	13.7	28.6	2.7	17.1

# Covers firms operating anytime during the year.
##See explanation regarding comparability of 1982 and 1977 data on page 6.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms, 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total##					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	15,907	20,152	$ 7,360.3##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	14,536	14,536	3,853.9	91.4	95.6	72.1	87.1	52.4	69.1
Multi-unit organizations	1,371	5,616	3,506.5	8.6	4.4	27.9	12.9	47.6	30.9
Less than 10 stores	1,342	2,908	1,677.3	8.4	4.3	14.4	10.8	22.7	19.8
10 or more stores	29	2,708	1,829.2	na	na	na	13.5	2.1	11.1
25 or more stores	6	2,388	1,481.0	na	na	11.9	1.1	20.2	7.7

na not available
## See above footnote.
###Excludes $154,594,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	14,508	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	30	0.2	14.0	27.7
$ 5.0 mil.-$ 9.9 mil.	59	0.4	1.5	5.4
$ 2.5 mil.-$ 4.9 mil.	157	1.1	2.3	7.6
$ 1.0 mil.-$2.49 mil.	795	5.5	6.6	16.4
Less than $1.0 mil.	13,467	92.8	75.6	42.8

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 30,003 firms in operation, including both those with payroll and those without paid employees. There were 15,632 firms with payroll in operation at the end of the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Sporting Goods Stores (General Line & Specialty Line)
Total (With Payroll) SIC Code 5941

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total##			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	18,590	$ 7,083.4	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	50	371.9	0.3	5.3	0.1	3.1
$ 2.5 mil.- $ 4.9 mil.	189	636.2	1.0	9.0	1.0	10.5
$ 1.0 mil.- $ 2.49 mil.	1,102	1,640.2	5.9	23.1	3.2	15.5
$ 0.5 mil.- $ 0.99 mil.	2,451	1,656.1	13.1	23.4	8.6	21.4
$ 0.25 mil.- $0.49 mil.	4,538	1,604.5	24.4	22.7	11.9	16.5
Under $0.25 million	10,260	1,174.5	55.2	16.5	75.2	33.0

## See explanation regarding comparability of 1982 and 1977 data on pages 35, 36.

** The 1977 census showed a total of 13,883 stores with payroll operating the entire year and 26,059 stores without payroll. Most of those stores without paid employees were bicycle shops. The 12,176 stores without payroll accounted for 47% of stores and 9.5% of sales. Comparable figures are not available for 1982. (The treatment of leased departments as separate stores in 1982 affects the data on smaller operations).

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: General Line Sporting Goods Stores (With Payroll)
SIC Code 5941 (Part)

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total##			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms	9,252	$ 4,377.5	100.0	100.0	100.0	100.0
4 largest firms	2,287	1,387.6	24.7	31.7	2.4	13.0
8 largest firms	2,382	1,573.5	25.7	35.9	3.0	16.6
20 largest firms	2,510	1,802.6	27.1	41.1	4.0	21.4
50 largest firms	2,692	2,021.1	29.1	46.2	5.5	26.6

# Covers firms operating anytime during the year.

## See explanation regarding comparability of 1982 and 1977 data on pages 35, 36.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	5,928	9,252	$ 4,305.0###	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	5,278	5,278	1,618.4	89.0	95.2	57.0	85.1	37.6	62.4
Multi-unit organizations	650	3,974	2,686.6	11.0	4.7	43.0	14.8	62.4	37.6
Less than 10 stores	628	1,376	952.9	10.6	4.5	14.9	10.9	22.1	18.8
10 or more stores	22	2,598	1,733.7	0.4	0.2	28.1	0.4	40.3	18.8
25 or more stores	6	2,378	1,479.7	0.1	na	25.7	na	34.4	na

na not available

## See above footnote.

\###Excludes $72,519,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982

	No. of Firms		Percent of Total##					
			Firms		Stores		Sales	
	1982	1977	1982	1977	1982	1977	1982	1977
Total	5,449	7,028	100.0	100.0	100.0	100.0	100.0	100.0
Sales volume of firms:								
$10.0 mil. or more	23	12	0.4	0.7	28.7	3.5	43.2	22.2
$ 5.0 mil.-$ 9.9 mil.	35	12	0.6	0.7	2.3	0.8	5.3	
$ 2.5 mil.-$ 4.9 mil.	96	33.5	1.8	4.8	3.2	8.1	7.9	25.5
$ 1.0 mil.-$2.49 mil.	407		7.5		7.1		14.2	
Less than $1.0 mil.	4,888	6,669	89.7	94.9	58.7	87.6	29.4	52.3

## See above footnote.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: General Line Sporting Goods Stores (With Payroll)
SIC Code 5941 (Part) (continued)

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total## 1982 Stores	1982 Sales	1977* Stores	1977* Sales
Total:	8,709	$ 4,195.2	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	31	239.6	0.4	5.7	0.2	3.4
$ 2.5 mil.- $ 4.9 mil.	136	461.4	1.6	11.0	0.8	14.4
$ 1.0 mil.- $ 2.49 mil.	726	1,088.7	8.3	26.0	5.3	20.1
$ 0.5 mil.- $ 0.99 mil.	1,526	1,055.3	17.5	25.2	11.5	22.7
$ 0.25 mil.-$ 0.49 mil.	2,523	904.7	29.0	21.6	14.2	15.4
Less than $0.25 mil.	3,767	445.5	43.3	10.6	68.0	24.0

## See explanation regarding comparability of 1982 and 1977 data on pages 37, 38. The treatment of leased departments as separate general line sporting goods stores in 1982 has an effect on the counts covering smaller individual stores. Leased departments included as single general line sporting goods stores with payroll in 1982 number 2,017 and had a volume of $1,060.5 million--24.2% of the $4,377.5 million in sales reported for all general line sporting goods stores with payroll in 1982.

* The 1977 census showed a total of 6,365 stores with payroll operating the entire year. Separate figures were not reported for stores without payroll. (See the data on SPORTING GOODS STORES, TOTAL, pages 37, 38.

Store Type: Specialty Line Sporting Goods Stores (including Bicycle Shops)
(With Payroll) SIC Code 5941 (Part)

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total## 1982 Stores	1982 Sales	1977 Stores	1977 Sales
All firms#	10,900	$ 3,137.4	100.0	100.0	100.0	100.0
4 largest firms	52	107.4	0.5	3.4	0.2	3.5
8 largest firms	85	146.7	0.8	4.7	0.4	5.0
20 largest firms	124	233.1	1.1	7.4	1.0	8.0
50 largest firms	220	372.9	2.0	11.9	2.0	12.0

# Covers firms operating anytime during the year.
## See explanation regarding comparability of 1982 and 1977 data on page 35, 36.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Specialty Line Sporting Goods Stores (including Bicycle Shops) (With Payroll) SIC Code 5941 (Part)

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total## Firms 1982	Firms 1977	Stores 1982	Stores 1977	Sales 1982	Sales 1977
Total	10,021	10,900	$ 3,055.0###	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	9,258	9,258	2,235.5	92.4	96.1	84.9	89.7	73.2	80.9
Multi-unit organizations	763	1,642	819.5	7.6	3.9	15.1	10.3	26.8	19.1
Less than 10 stores	757	1,554	743.7	7.5	na	14.2	na	24.4	na
10 or more stores	6	88	75.8	0.1	na	0.8	na	2.5	na

na not available

##See explanation regarding comparability of 1982 and 1977. Data on pages 35 and 36.

###Excludes $82,453,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR

	No. of Firms 1982	No. of Firms 1977	Percent of Total## Firms 1982	Firms 1977	Stores 1982	Stores 1977	Sales 1982	Sales 1977
Total	9,092	8,664	100.0	100.0	100.0	100.0	100.0	100.0
Sales volume of firms:								
$10.0 mil. or more	6	181	0.1	2.1	0.7	4.7	9.7	22.1
$ 5.0 mil.-$ 9.9 mil.	23		0.3		0.8			
$ 2.5 mil.-$ 4.9 mil.	64		0.7		1.6		7.6	
$ 1.0 mil.-$2.49 mil.	387		4.3		6.0		19.8	
$ 0.5 mil.-$ 0.9 mil.	809	463	8.9	5.8	10.3	6.6	18.9	17.8
Less than $0.5 mil.	7,803	8,020	85.8	92.6	80.6	88.7	44.0	60.1

## See above footnote.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total## 1982 Stores	1982 Sales	1977* Stores	1977* Sales
Total	9,881	$ 2,888.2	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	19	132.3	0.2	4.6	0.4	2.7
$ 2.5 mil.- $ 4.9 mil.	53	174.8	0.5	6.1		4.9
$ 1.0 mil.- $ 2.49 mil.	376	551.5	3.8	19.1	1.4	9.0
$ 0.5 mil.- $ 0.99 mil.	889	600.8	9.0	20.8	6.2	19.5
$0.25 mil. - $0.49 mil.	2,015	699.8	20.4	24.2	10.0	17.9
Less than $0.25 mil.	6,529	729.0	66.1	25.2	82.0	46.0

(footnote on next page)

**The 1977 census showed a total of 7,518 stores with payroll operating the entire year. Separate figures were not reported for stores without payroll However, in 1977 the census counted 12,176 sporting goods stores without payroll--including both general line and specialty line. As previously noted, many of the specialty line stores without payroll are bicycle shops. Comparable figures are not available for 1982. (The treatment of leased departments as separate stores in 1982 has an affect on data covering smaller stores.

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

Store Type: Furniture Stores (With Payroll) SIC Code 5712

According to the 1982 census, 29,609 furniture stores with payroll were operated by 24,926 firms. This was down from the comparable estimate for 1977, indicating a total of 31,366 furniture stores, or leased departments, operated by 27,344 firms. While the number of furniture store firms declined about 9% in the five-year span, sales (on a current dollar basis) were up 26.4%.

The 50 largest firms in 1982 operated 4.1% of the furniture outlets with payroll, and had a 17.3% share of total sales. Comparable figures in 1977 were 3.9% and 16.6%. In 1982, 3,312 furniture store companies (13.8% of the total) had a sales volume of $1.0 million or more. These firms operated one out of four furniture outlets, but garnered almost two-thirds (64.3%) of total furniture store (with payroll) sales.

On an individual store basis, stores with a volume of $1.0 million or more--representing 14.4% of the 1982 total count (or 4,099 stores) accounted for 54.9% of total furniture store (with payroll) sales in 1982. In 1977, stores with a volume of $1.0 million or more represented 9.9% of the store count, and garnered 44.5% of furniture store (with payroll) volume.

In 1977, there were 8,211 furniture stores that did not have any paid employees. (Figures available from the 1982 census cover only those operations that have paid employees). In 1977, the stores wtihout payroll accounted for 22.7% of all furniture stores, but had only a 2.7% share of total sales.

Small stores with less than 10 employees accounted for 80% of the total store count in 1982 and 39% of sales. (The inclusion of leased departments as separate stores in 1982 affects, to an undetermined extent, the data on smaller stores). Those with 100 or more employees represented 0.2% of stores and 5.4% of sales.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	29,609	$17,223.4	100.0	100.0	100.0	100.0
4 largest firms	187	875.4	0.6	5.1	0.5	5.5
8 largest firms	387	1,327.5	1.3	7.7	1.0	7.7
20 largest firms	696	2,122.2	2.4	12.3	2.6	11.7
50 largest firms	1,216	2,974.6	4.1	17.3	3.9	16.6

# Covers firms operating anytime during the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Furniture Stores (With Payroll) SIC Code 5712

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	24,926	29,609	$16,872.5##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	22,440	22,440	9,197.1	90.0	94.1	75.8	82.1	54.5	62.2
Multi-unit organizations	2,486	7,169	7,675.4	10.0	5.9	24.2	17.9	45.5	37.8
Less than 10 stores	2,414	5,438	4,955.3	9.7	5.7	18.4	13.6	29.4	24.1
10 or more stores	72	1,731	2,712.1	0.3	0.2	5.8	4.3	16.1	13.7
50 or more stores	10	674	1,212.0	###	###	2.3	1.9	7.2	6.4

##Excludes $350,819,000 in sales of firms not in business at end of year.
###Less than 0.1%

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	23,898	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	126	0.5	6.0	24.1
$ 5.0 mil.-$ 9.9 mil.	187	0.8	2.7	7.5
$ 2.5 mil.-$ 4.9 mil.	537	2.2	4.5	10.9
$ 1.0 mil.-$2.49 mil.	2,462	10.3	12.0	21.8
Less than $1.0 mil.	20,586	86.1	74.9	35.7

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 36,825 firms in operation, including both those with payroll and those without paid employees. There were 27,344 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	28,372	$16,416.3	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	231	2,145.3	0.8	13.1	0.6	10.6
$ 2.5 mil.- $ 4.9 mil.	596	2,020.3	2.1	12.3	2.3	13.7
$ 1.0 mil.- $ 2.49 mil.	3,272	4,842.1	11.5	29.5	7.0	20.2
$ 0.5 mil.- $ 0.9 mil.	5,164	3,602.5	18.2	21.9	16.0	23.7
$ 0.25 mil.- $0.49 mil.	6,494	2,327.0	22.9	14.2	17.7	14.7
Under $0.25 million	12,615	1,479.1	44.5	9.0	56.4	17.1

(footnote on next page)

Store Type: Furniture Stores (With Payroll) SIC Code 5712

(footnote from preceding table)

** The 1977 census showed a total of 27,999 stores with payroll operating the entire year, and a total of 36,210 including non-employer stores. The 8,211 furniture store operations without paid employees accounted for 22.7% of the stores but only 2.7% of sales. Comparable figures are not available for 1982. (As previously noted, in 1982 leased departments were counted as separate stores. This has an undetermined impact on smaller store data in 1982).

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

Store Type: Floor Covering Stores (With Payroll) SIC Code 5713

In 1982, according to the census, there were 9,554 firms operating 11,125 stores with payroll specializing in the retail sale of floor coverings. This compares with 10,032 firms in business in 1977.

Floor covering specialty stores are mainly relatively small operations. In 1982, 89% of the firms had annual sales of less than $1.0 million and operated 78% of the floor covering specialty stores with payroll. These firms garnered a 48.2% share of sales.

Most are single units, representing about 93% of the firms, 80% of the stores, and 69% of the sales in 1982. Multi-unit operations have expanded since 1977, however. Firms operating more than one store increased their sales share from 23.5% in 1977 to 31.4% in 1982. Larger stores have also increased their sales share. In 1982, floor covering stores with an annual volume of $1.0 million or more (10.1% of the stores) accounted for 39.7% of total sales. Comparable figures for 1977 were 6.6% and 30.3%, respectively. Inflation in the period is, of course, a factor in the changing composition of stores by volume group.

Smaller floor covering stores, with less than 10 employees represented 88.5% of the stores in 1982 and had a 63.4% share of sales. These include an unreported number of leased departments. (See INTRODUCTION). Stores with a volume under $500,000 in 1982 (again, including the leased departments counted as floor covering specialty stores) represented more than seven out of 10 establishments with payroll in 1982 and had a third of sales.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	11,125	$ 5,015.5	100.0	100.0	100.0	100.0
4 largest firms	664	359.2	6.0	7.2	3.3	4.5
8 largest firms	720	423.5	6.5	8.4	3.8	6.1
20 largest firms	807	556.3	7.3	11.1	4.6	9.0
50 largest firms	941	756.3	8.5	15.0	5.6	13.0

# Covers firms operating anytime during the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Floor Covering Stores (With Payroll) SIC Code 5713

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	9,554	11,125	$ 4,919.1##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	8,856	8,856	3,375.8	92.6	95.9	79.6	85.9	68.6	76.5
Multi-unit organizations	698	2,269	1,543.3	7.3	4.1	20.4	14.1	31.4	23.5
Less than 10 stores	683	1,439	1,085.3	7.1	4.0	12.9	9.7	22.1	16.9
10 or more stores	15	830	458.0	0.2	0.1	7.5	4.4	9.3	6.6
25 or more stores	4	674	351.4	0.1	###	6.1	3.1	7.1	3.7

## Excludes $96,387,000 in sales of firms not in business at end of year.
### Less than 0.1%.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	9,080	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	18	0.2	7.5	11.1
$ 5.0 mil.-$ 9.9 mil.	48	0.5	1.8	6.2
$ 2.5 mil.-$ 4.9 mil.	153	1.7	3.4	10.9
$ 1.0 mil.-$2.49 mil.	782	8.6	9.5	23.5
Less than $1.0 mil.	8,079	89.0	77.9	48.2

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 16,036 firms in operation, including both those with payroll and those without paid employees. There were 10,032 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	10,594	$ 4,805.5	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	24	151.7	0.2	3.2	0.1	1.2
$ 2.5 mil.- $ 4.9 mil.	134	452.2	1.3	9.4	1.4	10.6
$ 1.0 mil.- $ 2.49 mil.	914	1,303.1	8.6	27.1	5.1	18.5
$ 0.5 mil.- $ 0.9 mil.	1,875	1,293.2	17.7	26.9	14.9	27.4
$ 0.25 mil.- $0.49 mil.	2,848	1,019.7	26.9	21.2	18.4	19.2
Less than $0.25 mil.	4,799	585.6	45.3	12.2	60.1	23.1

(footnote on next page)

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

(footnote from preceding table)

Store Type: Floor Covering Stores (With Payroll) SIC Code 5713

** The census showed a total of 9,724 stores with payroll operating the entire year and 14,808 including non-employer stores. The 5,084 floor covering stores without paid employees accounted for 34.3% of stores and 5.3% of sales. Comparable figures are not available for 1982. (In 1982, leased departments were counted as separate specialty stores which has an effect on smaller store data.)

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

Store Type: Drapery, Curtain, Uphoholstery Stores (With Payroll)
SIC Code 5714

In 1982, there were 3,720 firms specializing in the retail sales of draperies, curtains, slipcovers and upholstery materials, as well as those selling custom-made draperies and slipcovers for household use (but not those primarily engaged in reupholstering or furniture repair). There were 4,063 stores with payroll in this classification, with sales totaling $858 million.

Most firms are single-unit operations--representing 93% of the firms, about 86% of the stores and 75% of sales. However, firms operating more than one store increased their sales share from 17.7% in 1977 to almost 25% in 1982. The 104 firms which had sales of $1.0 million or more in 1982 (2.9% of the total firms in this retailer classification) accounted for 7.9% of the stores and 27.1% of the drapery/curtain store (with payroll) sales in that year.

Most individual stores have a volume under $250,000 annually. Stores in this category in 1982 represented almost 75% of the store count and accounted for about 35% of sales.

Stores with less than 10 employees represented 90% of stores and 66% of sales in 1982. In 1982 leased departments were counted by the Census Bureau as separate specialty stores. This has an undetermined impact on smaller store data.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	4,063	$ 858.1	100.0	100.0	100.0	100.0
4 largest firms	54	40.4	1.3	4.7	1.3	4.9
8 largest firms	72	67.5	1.8	7.9	1.9	6.8
20 largest firms	139	107.4	3.4	12.5	3.1	10.4
50 largest firms	219	163.4	5.4	19.0	4.6	16.4

# Covers firms operating anytime during the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Drapery, Curtain, Upholstery Stores (With Payroll)
SIC Code 5714

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	3,720	4,063	$ 840.2##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	3,476	3,476	631.3	93.4	97.3	85.6	91.3	75.1	82.3
Multi-unit organizations	244	587	208.8	6.6	2.7	14.4	8.7	24.9	17.7
Less than 10 stores	240	506	179.7	6.4	na	12.5	8.6	21.4	na
10 or more stores	4	81	29.2	0.2	na	2.0	0.1	3.5	na

##Excludes $17,918,000 in sales of firms not in business at end of year.
na not available

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	3,561	100.0	100.0	100.0
Sales volume of firms:				
$ 5.0 mil.-$ 9.9 mil.	8	0.2	2.3	7.6
$ 2.5 mil.-$ 4.9 mil.	9	0.3	1.1	3.6
$ 1.0 mil.-$ 2.49 mil.	87	2.4	4.5	15.9
$ 0.5 mil.-$ 0.9 mil.	235	6.6	7.8	19.6
Less than $ 0.5 mil.	3,222	90.5	84.3	53.2

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 11,147 firms in operation, including both those with payroll and those without paid employees. There were 4,158 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	3,893	$ 807.1	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	3	20.6	0.1	2.6	0.6	6.1
$ 2.5 mil.- $ 4.9 mil.	4	12.7	0.1	1.6		
$ 1.0 mil.- $ 2.4 mil.	60	86.0	1.5	10.7		
$ 0.5 mil.- $ 0.9 mil.	271	181.1	7.0	22.4	4.3	17.7
$ 0.25 mil.- $0.49 mil.	650	225.1	16.7	27.9	8.6	20.6
Under $ 0.25 mil.	2,905	281.6	74.6	34.8	86.5	55.6

(footnote on next page)

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Drapery, Curtain & Upholstery Stores (With Payroll) SIC Code 5714

(footnote from preceding table)

** The census showed a total of 3,867 stores with payroll operating the entire year and 10,061 including non-employer stores. The 6,194 curtain, drapery & upholstery stores without paid employees accounted for 61.5% of stores and 14.7% of sales. Comparable figures are not available for 1982. (In 1982 leased departments were counted as separate specialty stores which has an effect on smaller store data.

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

Store Type: Miscellaneous Homefurnishings Stores (With Payroll) SIC Code 5719

This classification includes retailers of miscellaneous homefurnishings, such as china and glassware, metalware, linens and domestics, lamps, venetian blinds, etc. It does not include house-to-house sales organizations or party plan merchandising.

This classification is composed primarily of smaller stores. In 1982, there were 7,883 firms operating 9,649 stores with payroll in the classification. Most (90%) firms were single-unit operations, but accounted for only about half of the total sales, which amounted to close to $3.0 billion in 1982. The 10.1% of firms that operated more than one store (794 firms) operated 26.5% of the stores, and accounted for 49.2% of 1982 sales. In 1977, multi-unit firms represented only 4.9% of the firms, operated 14.6% of the stores, and controlled 23% of sales.

The 421 firms with a volume of $1.0 million or more in 1982 (5.7% of the firms in operation the entire year) had 18.4% of the stores, and garnered almost 55% of total sales by miscellaneous homefurnishings stores with payroll.

On an individual store basis, those with a volume of $1.0 million or more in 1982--438 stores, or 4.9% of the total--accounted for 36.6% of sales. In 1977, stores of this size represented 2.3% of the total reported with payroll, and had 24.1% of sales.

While stores with less than 10 employees accounted for 87.4% of stores and 53.1% of sales, those with 100 or more represented 0.1% of stores and 6.7% of sales.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total 1982 Stores	1982 Sales	1977 Stores	1977 Sales
All firms#	9,649	$ 2,974.7	100.0	100.0	100.0	100.0
4 largest firms	274	297.5	2.8	10.0	0.8	7.4
8 largest firms	474	446.4	4.9	15.0	1.2	10.3
20 largest firms	588	642.3	6.1	21.6	2.1	14.2
50 largest firms	830	866.4	8.6	29.1	3.6	20.5

# Covers sales of firms operating anytime during the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Miscellaneous Homefurnishings Stores (With Payroll) SIC Code 5719

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	7,883	9,649	$ 2,918.0##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	7,089	7,089	1,481.7	89.9	95.1	73.5	85.4	50.8	77.0
Multi-unit organizations	794	2,560	1,436.3	10.1	4.9	26.5	14.6	49.2	23.0
Less than 10 stores	769	1,715	971.8	9.8	na	17.8	na	33.3	na
10 or more stores	25	845	464.5	0.3	na	8.8	na	15.9	na
50 or more stores	6	555	312.1	0.1	—	5.8	—	10.7	—

na not available
## Excludes $56,701,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	7,361	100.0	100.0	100.0
Sales volume of firms:				
$ 5.0 mil. or more	51	0.7	9.2	30.5
$ 2.5 mil.-$ 4.9 mil.	74	1.0	2.3	8.8
$ 1.0 mil.-$2.49 mil.	296	4.0	6.9	15.2
Less than $1.0 mil.	6,940	94.3	81.6	45.6

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 12,512 firms in operation, including both those with payroll and those without paid employees. There were 5,808 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total:	9,030	$ 2,813.7	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	25	307.3	0.3	10.9	2.3	24.1
$ 2.5 mil.- $ 4.9 mil.	65	216.4	0.7	7.7		
$ 1.0 mil.- $ 2.49 mil.	348	507.1	3.9	18.0		
$ 0.5 mil.- $ 0.99 mil.	825	551.4	9.1	19.6	6.0	18.3
$ 0.25 mil.- $0.49 mil.	1,684	587.5	18.6	20.9	40.3	15.3
Less than $0.25 mil.	6,083	644.0	67.4	22.9	51.4	42.3

(footnotes on next page)

Store Type: Miscellaneous Homefurnishings Stores (With Payroll) SIC Code 5719

(footnote from preceding page)

** The census showed a total of 5,406 stores with payroll operating the entire year and 10,714 including non-employer stores. The 5,308 miscellaneous home furnishings stores without paid employees accounted for 49.5% of stores and 10.7% of sales. Comparable figures are not available for 1982.

Note: For information on store classifications, on comparability of 1982 and 1977 figures, and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

Store Type: Household Appliance Stores (With Payroll) SIC Code 572

A total of 9,226 firms operated 10,542 appliance stores which had one or more paid employees in 1982, and generated a sales volume of $5.7 billion in that year. In 1977, an estimated 12,285 household appliance stores were in operation anytime during the year. While store counts were down 14.2%, sales gained 26.3% on a current dollar basis.

The 50 largest household appliance store firms operated 3.9% of the appliance stores with payroll in 1982, and held an almost 20% share of sales of such stores. Multi-unit firms (10.5% of the 1982 total compared with 5.2% in 1977) had a 39% share of appliance store (with payroll) sales as compared with about 33% in 1977.

The 1,159 firms that had a volume of $1.0 million or more in 1982--13.1% of the firms--operated 20.7% of the stores and chalked up a 61% share of appliance store (with payroll) sales.

Out of a total of 10,094 appliance stores in operation the entire year 1982, 1,354 (13.4% of the employer stores) had a volume of $1.0 million or more. These stores accounted for 54% of the employer-store sales total that year. In 1977, 7.3% of the stores had a volume of $1.0 million or more, and accounted for 38.2% of total appliance store (with payroll) sales.

There were more than 8,600 stores with fewer than 10 employees in 1982, representing 52% of sales; 48.3% of the stores had a volume of $250,000 or less and a 10% sales share. The treatment of leased departments as separate stores in 1982 has an effect on smaller store data--the extent of which cannot be determined at this time.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	10,542	$ 5,697.3	100.0	100.0	100.0	100.0
4 largest firms	147	435.4	1.4	7.6	8.0	10.9
8 largest firms	181	556.4	1.7	9.8	8.7	12.9
20 largest firms	294	792.2	2.8	13.9	9.6	16.8
50 largest firms	412	1,133.9	3.9	19.9	10.5	21.9

# Covers firms operating anytime during the year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Household Appliance Stores (With Payroll) SIC Code 572

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	9,226	10,542	$ 5,593.0##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	8,253	8,253	3,414.8	89.5	94.8	78.3	77.7	61.1	67.3
Multi-unit organizations	973	2,289	2,178.2	10.5	5.2	21.7	22.3	38.9	32.7
Less than 10 stores	955	1,928	1,597.9	10.3	5.1	18.3	10.9	28.6	18.0
10 or more stores	18	361	580.3	0.2	0.2	3.4	11.4	10.4	14.7

##Excludes $104,256,000 in sales of firms not in business at end of year.

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	8,809	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	37	0.4	3.7	18.4
$ 5.0 mil.-$ 9.9 mil.	52	0.6	1.9	6.2
$ 2.5 mil.-$ 4.9 mil.	211	2.4	4.0	12.9
$ 1.0 mil.-$2.49 mil.	859	9.8	11.1	23.3
$0.5 mil.- $0.99 mil.	1,436	16.3	16.0	18.3
Less than $0.5 mil.	6,214	70.5	63.3	20.8

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 15,345 firms in operation, including both those with payroll and those without paid employees. There were 10,033 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	10,094	$ 5,440.7	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	63	561.9	0.6	10.3	0.3	7.3
$ 2.5 mil.- $ 4.9 mil.	243	797.3	2.4	14.7	1.7	12.6
$ 1.0 mil.- $ 2.49 mil.	1,048	1,565.1	10.4	28.8	5.3	18.3
$ 0.5 mil.- $ 0.99 mil.	1,729	1,206.0	17.1	22.2	13.6	24.2
$ 0.25 mil.-$0.49 mil.	2,131	763.3	21.1	14.0	16.7	16.4
Under $0.25 million	4,880	544.1	48.3	10.0	62.4	21.2

** The census showed a total of 11,091 stores with payroll operating the entire year and 15,680 including non-employer stores. The 4,589 household appliance stores without paid employees accounted for 29.3% of stores and 4.0% of sales. (Comparable figures are not available for 1982. Treatment of leased departments as separate stores in 1982 has an undetermined effect on smaller store data.)

Note: For information on store classifications, on comparability of 1982 and 1977 figures, and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Radio/Television Stores (With Payroll) SIC Code 5732

The 50 largest firms operating radio and television specialty stores (with payroll) in 1982 had 32.3% of the stores (6,292) and controlled 40.2% of total sales by stores in this classification. In 1977, the top 50 firms operated 25.7% of the stores and had a 32.7% share of sales.

While multi-unit firms in this business accounted for only 9.4% of the firms in 1982, they operated 45.2% of the stores and chalked up almost 58% of the sales. In 1977, multi-unit firms represented 5.8% of the total, operated 36% of the stores, and had 47.7% of sales.

In 1982, 83 firms reported a total volume of $10 million or more. These firms controlled 46% of the sales of radio/TV stores with payroll, while operating about 35% of the stores. Total firms with sales of $1.0 million or more, numbering 1,251 in 1982, operated 45.7% of the stores, and held a 73% share of sales.

On an individual store basis, those with a volume of $1.0 million or more in 1982, numbering 1,899 (10.4% of the total) accounted for 48.3% of total sales. Comparable figures for stores of this volume in 1977 were 4.6% and 29.3%, respectively.

Smaller stores with less than 10 employees accounted for over 90% of radio/television stores in 1982 while those with 50 or more employees accounted for 0.3%. The small stores had 60.6% of sales whiile larger stores had 5.6%. As noted in the INTRODUCTION, leased departments were counted as separate stores in 1982, which mainly affects smaller store data.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	19,462	$ 9,764.2	100.0	100.0	100.0	100.0
4 largest firms	5,291	2,123.1	27.2	21.7	22.1	18.5
8 largest firms	5,632	2,546.1	28.9	26.1	22.5	21.4
20 largest firms	5,979	3,251.2	30.7	33.3	24.2	26.6
50 largest firms	6,292	3,929.7	32.3	40.2	25.7	32.7

# Covers firms operating anytime during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	11,780	19,462	$ 9,610.3##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	10,662	10,662	4,073.2	90.6	94.2	54.8	64.0	42.3	52.3
Multi-unit organizations	1,118	8,800	5,537.1	9.4	5.8	45.2	36.0	57.7	47.7
Less than 10 stores	1,075	2,393	2,182.0	9.2	5.5	12.3	10.4	22.7	21.6
10 or more stores	43	6,407	3,355.1	0.3	0.3	32.9	25.6	35.0	26.1
50 or more stores	10	5,800	2,524.6	0.1	0.1	30.1	22.7	26.3	18.9

## Excludes $153,933,000 in sales of firms not in business at end of year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Radio/Television Stores (With Payroll) SIC Code 5732

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	10,967	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	83	0.7	34.6	45.8
$ 5.0 mil.-$ 9.9 mil.	77	0.7	1.7	5.3
$ 2.5 mil.-$ 4.9 mil.	218	2.0	2.7	7.8
$ 1.0 mil.-$2.49 mil.	873	8.0	6.7	13.7
Less than $1.0 mil.	9,716	88.6	54.3	27.4

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 19,407 firms in operation, including both those with payroll and those without paid employees. There were 11,339 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	18,127	$ 9,247.4	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	145	1,300.6	0.8	14.1	0.2	6.1
$ 2.5 mil.- $ 4.9 mil.	295	992.7	1.6	10.7	1.1	9.5
$ 1.0 mil.- $ 2.49 mil.	1,459	2,172.2	8.0	23.5	3.3	13.7
$ 0.5 mil.- $ 0.99 mil.	2,740	1,882.5	15.1	20.4	10.2	21.2
$ 0.25 mil.-$0.49 mil.	5,055	1,773.0	27.9	19.2	15.5	18.4
Under $0.25 million	8,433	1,126.3	46.5	12.2	69.7	31.1

** The census showed a total of 14,668 stores with payroll operating the entire year and 21,771 including non-employer stores. The 7,103 radio/television stores without paid employees accounted for 32.6% of stores and 4.7% of sales. Comparable figures are not available for 1982. (In 1982, leased departments were counted as separate stores, which affects smaller store data.)

Note: For information on store classifications, on comparability of 1982 and 1977 figures, and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Hardware Stores (With Payroll) SIC Code 525

According to the 1982 census of retail trade, there were 18,437 firms operating 19,870 hardware stores with payroll in 1982. Most firms are single-store operations, but multi-unit companies have increased in number and sales share compared with 1977 census counts. These companies accounted for 29.1% of hardware store sales in 1982, up from 21.3% in 1977. The share of sales accounted for by the largest hardware retailing operations, however, remained quite stable--14.8% in 1982 vs. 14.4% in 1977.

Total hardware store sales in 1982 amounted to $8.3 billion, up 45% on a current dollar basis compared with 1977. Hardware stores with a sales volume of $1.0 million or more accounted for 8.0% of the stores, 38.1% of hardware store sales. Comparable figures for 1977 were 4.7% and 28.3%, respectively.

On an individual store basis, hardware stores with less than 10 employees represented 82% of stores and 47% of sales. Those with 100 or more employees accounted for 0.1% of stores and 1.4% of sales in 1982.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	19,870	$ 8,335.1	100.0	100.0	100.0	100.0
4 largest firms	172	655.4	0.9	7.9	0.6	7.2
8 largest firms	390	804.4	2.0	9.7	1.5	9.3
20 largest firms	497	987.1	2.5	11.8	2.1	11.6
50 largest firms	628	1,232.6	3.2	14.8	2.8	14.4

# Firms operating anytime during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	18,437	19,870	$ 8,185.7##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	17,272	17,272	5,803.0	93.6	97.6	86.9	92.3	70.9	78.7
Multi-unit organizations	1,165	2,598	2,382.7	6.4	2.4	13.1	7.7	29.1	21.3
Less than 10 stores	1,147	2,063	1,490.5	6.2	2.3	10.3	5.8	18.2	12.4
10 or more stores	21	535	892.1	0.2	na	2.7	1.9	10.9	8.9
50 or more stores	6	240	407.6	na	na	1.2	na	5.0	na

##Excludes $59,764,000 in sales of firms not in business at end of year.
na - not available

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Hardware Stores (With Payroll) SIC Code 525

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total Firms	Percent of Total Stores	Percent of Total Sales
Total	17,555	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	23	0.1	2.8	12.7
$ 5.0 mil.-$ 9.9 mil.	59	0.3	1.2	4.9
$ 2.5 mil.-$ 4.9 mil.	177	1.0	1.8	7.4
$ 1.0 mil.-$2.49 mil.	1,062	6.0	7.2	19.1
Less than $1.0 mil.	16,234	92.5	87.1	56.0

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 25,408 firms in operation, including both those with payroll and those without paid employees. There were 18,308 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total 1982 Stores	Percent of Total 1982 Sales	Percent of Total 1977** Stores	Percent of Total 1977** Sales
Total	18,954	$ 7,971.7	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	59	424.7	0.3	5.3	0.2	3.7
$ 2.5 mil.- $ 4.9 mil.	248	828.7	1.3	10.4	1.2	10.4
$ 1.0 mil.- $ 2.49 mil.	1,225	1,782.8	6.4	22.4	3.3	14.2
$ 0.5 mil.- $ 0.99 mil.	2,855	1,956.9	15.0	24.5	9.3	19.9
Under $0.5 million	14,567	2,978.6	76.8	37.4	86.0	51.8

** The census showed a total of 17,257 stores with payroll operating the entire year and 23,404 including non-employer stores. The 6,147 hardware stores without paid employees accounted for 26.3% of stores and 5.8% of sales. Comparable figures are not available for 1982.

Note: For information on store classifications, on comparability of 1982 and 1977 figures, and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Grocery Stores/Supermarkets SIC Code 541

In 1982, according to the census, there were 81,478 firms operating over 128,000 grocery stores with payroll, but the 50 largest firms owned 16% of the grocery stores and controlled 45% of total sales--about the same sales share held by the top 50 in 1977. Over three-quarters of grocery store volume is done by multi-unit firms; those owning 10 or more stores had a 63.5% share of sales in 1982, up from 61% in 1977.

Individual grocery stores which had annual sales of $5.0 million or more (in current dollars) represented 11.6% of the store count in 1982, 6.2% in 1977; their share of the sales rose to almost 60% from about 38% in 1977.

While stores with 100 or more employees accounted for only 1.9% of stores, they garnered 16.8% of sales. Stores with less than 10 employees were 66% of stores and 13.8% of sales.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms #	128,494	$226,609.1	100.0	100.0	100.0	100.0
4 largest firms	4,751	37,108.5	3.7	16.4	4.9	17.9
8 largest firms	11,528	54,504.0	9.0	24.1	6.5	25.0
20 largest firms	14,500	80,623.2	11.3	35.6	11.0	35.4
50 largest firms	20,137	101,184.0	15.7	44.7	14.9	44.6

# Firms operating anytime during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms, 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	81,478	128,494	$224,453.9##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	76,112	76,112	52,262.8	93.4	95.9	59.2	63.7	23.3	27.0
Multi-unit organizations	5,366	52,382	172,191.0	6.6	4.1	40.8	36.3	76.7	73.0
Less than 10 stores	4,816	12,044	29,696.1	5.9	3.6	9.4	7.5	13.2	12.0
10 or more stores	550	40,338	142,494.9	0.7	0.5	31.4	28.8	63.5	61.0
50 or more stores	138	32,329	115,376.8	0.2	0.1	25.2	22.8	51.4	48.9

##Excludes $2,155,217,000 in sales of firms not in business at end of year.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Grocery Stores/Supermarkets SIC Code 541

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Stores	Sales
Total	75,657	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	1,460	1.9	34.2	74.0
$ 5.0 mil.-$ 9.9 mil.	1,799	2.4	3.3	5.6
$ 2.5 mil.-$ 4.9 mil.	4,030	5.3	4.8	6.3
$ 1.0 mil.-$2.49 mil.	8,939	11.8	8.5	6.3
Less than $1.0 mil.	59,429	78.6	49.1	7.8

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 136,263 firms in operation, including both those with payroll and those without paid employees. There were 84,063 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Stores	Sales	Stores	Sales
Total	121,039	$214,868.4	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	14,022	128,796.4	11.6	59.9	6.2	37.9
$ 2.5 mil.- $ 4.9 mil.	9,839	35,920.3	8.1	16.7	13.5	36.1
$ 1.0 mil.- $ 2.49 mil.	13,758	21,443.8	11.4	10.0	8.0	9.5
$ 0.5 mil.- $ 0.99 mil.	20,501	14,498.5	16.9	6.7	10.3	5.8
Under $0.5 million	62,919	14,208.9	52.0	6.6	62.0	10.7

** The census showed a total of 111,326 stores with payroll operating the entire year and 156,098 including non-employer stores. The 44,772 grocery stores/supermarkets without paid employees accounted for 28.7% of stores and 2.2% of sales. Comparable figures are not available for 1982.

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Drug and Proprietary Stores (With Payroll) SIC Code 591

Firms operating drug stores and proprietary stores (defined as drug stores which do not fill prescriptions) which had paid employees numbering 34,196 in 1982 and operated 49,527 stores with sales totaling $36.2 billion. The 50 largest firms in this classification operated 22.6% of the stores in 1982, and controlled almost 52% of sales. Comparable percentages for firms of this size in 1977 were 18.0% and 45.5%, respectively.

Chain organizations dominate this aspect of retailing. In 1982, firms with 10 or more drug or proprietary stores (118 firms) held a 55% share of total sales while operating only 25.3% of the stores. In 1977, chains of this size had a 48.3% share of sales.

Firms with a volume of $10 million or more in 1982 (numbering 126 firms) operated about 26% of the stores in this classification, and garnered 56.4% of the total sales credited to stores with payroll.

Most individual stores had sales under $500,000 in 1982. Larger-volume stores (42.9% of the total) chalked up almost 81% of total sales. In 1977, stores in this classification which had a volume of $500,000 or more registered a 67.4% share of sales.

There were only 15 drug and proprietary stores with 100 or more employees in 1982. These stores accounted for 0.6% of total sales. Stores with less than 10 employees accounted for 61.1% of stores and 25.4% of sales. In 1982, leased departments were counted as separate drug stores, which affects smaller store counts to an undetermined degree.

CONCENTRATION OF LARGEST FIRMS

	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Stores	Sales	Stores	Sales
All firms#	49,527	$36,242.4	100.0	100.0	100.0	100.0
4 largest firms	4,192	6,778.5	8.5	18.7	5.4	14.1
8 largest firms	6,289	10,932.0	12.6	30.1	9.1	23.6
20 largest firms	9,829	16,581.2	19.8	45.8	13.6	37.7
50 largest firms	11,230	18,727.6	22.6	51.7	18.0	45.5

# Covers firms operating anytime during the year.

FIRM SIZE: NUMBER OF STORES OPERATED

	No. of Firms 1982	No. of Stores Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Stores		Sales	
				1982	1977	1982	1977	1982	1977
Total	34,196	49,527	$35,834.1##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	31,756	31,756	12,767.7	92.9	94.4	64.1	68.9	35.6	41.1
Multi-unit organizations	2,440	17,771	23,066.4	7.1	5.6	35.9	31.1	64.4	58.9
Less than 10 stores	2,322	5,274	3,396.8	6.8	5.3	10.7	10.7	9.4	10.6
10 or more stores	118	12,497	19,669.6	0.4	0.3	25.3	20.4	54.9	48.3
50 or more stores	34	10,879	17,690.4	0.1	###	22.0	16.9	49.4	42.0

## Excludes $408,284,000 in sales of firms not in business at end of year.
###Less than 0.1%.

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Store Type: Drug and Proprietary Stores (With Payroll) SIC Code 591

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total Firms	Percent of Total Stores	Percent of Total Sales
Total	32,844	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	126	0.4	25.6	56.4
$ 5.0 mil.-$ 9.9 mil.	92	0.3	1.1	1.8
$ 2.5 mil.-$ 4.9 mil.	346	1.1	1.8	3.3
$ 1.0 mil.-$2.49 mil.	2,401	7.3	7.1	9.7
Less than $1.0 mil.	29,879	91.0	64.3	28.8

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 36,837 firms in operation, including both those with payroll and those without paid employees. There were 34,436 firms with payroll in operation at the end of the year.

STORES (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Stores 1982	Sales, 1982 (mil. $)	Percent of Total 1982 Stores	Percent of Total 1982 Sales	Percent of Total 1977** Stores	Percent of Total 1977** Sales
Total	47,423	$34,964.4	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	437	3,171.7	0.9	9.1	0.4	5.2
$ 2.5 mil.- $ 4.9 mil.	1,782	5,994.7	3.8	17.1	2.6	15.0
$ 1.0 mil.- $ 2.49 mil.	7,820	11,780.1	16.5	33.7	8.7	23.6
$ 0.5 mil.- $ 0.99 mil.	10,286	7,225.4	21.7	20.7	16.8	23.6
$ 0.25 mil.- $0.49 mil.	13,527	4,880.8	28.5	14.0	19.4	14.8
Under $0.25 million	13,571	1,911.7	28.6	5.5	52.1	17.8

** The census showed a total of 44,331 stores with payroll operating the entire year and 46,384 including non-employer stores. The 2,053 drug and proprietary stores without paid employees accounted for 4.4% of stores and 0.5% of sales. Comparable figures are not available for 1982. (In 1982 leased departments were counted as separate stores, which mainly affects smaller store data).

Note: For information on store classifications, on comparability of 1982 and 1977 figures, and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Retailer Type: Mail Order Houses (With Payroll) SIC Code 5961

Although the large mail order houses dominate this business--the four largest in 1982 controlling 26% of sales--there is less concentration than noted in the 1977 census reports. In that year, the four largest firms controlled 31.5% of sales. Many specialized mail order firms have come into the business.

However, a factor that must also be kept in mind is that large mail order operations, such as Sears and Ward (now out of the mail order operation), have expanded their retail store operations, and figures for these operations are not included here but are covered in data on specific store types in which they fit. In addition, catalog order desks in stores are included in sales data on the stores in which they operate.

In 1982, a total of 7,433 establishments were classified as mail order houses with payroll, of which 3,172 handled department store merchandise. Total mail order volume handled by firms with payroll amounted to about $11.2 billion, with sales of those selling department store merchandise amounting to $4.3 billion, or 38% of the total.

In 1977, 3,659 establishments were classified as handling department store merchandise (out of a total 6,721 with payroll), and had sales of $3.4 billion, or 46% of the mail order firm (with payroll) total.

Despite the small number of establishments (1.6% of the total), mail order houses with 100 or more employees accounted for 43.2% of sales in 1982. Smaller establishments--those with less than 10 employees--represented 74% of establishments and 18.9% of sales.

CONCENTRATION OF LARGEST FIRMS

	No. of Establishments Operated, 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977	
			Estab.	Sales	Estab.	Sales
All firms#	7,433	$11,253.7	100.0	100.0	100.0	100.0
4 largest firms	1,257	2,924.2	16.9	26.0	25.3	31.5
8 largest firms	1,269	3,818.6	17.0	33.9	25.6	40.8
20 largest firms	1,311	5,083.5	17.6	45.2	26.0	52.0
50 largest firms	1,381	6,452.4	18.6	57.3	26.7	64.4

# Covers firms operating anytime during the year.

FIRM SIZE: NUMBER OF ESTABLISHMENTS OPERATED

	No. of Firms, 1982	No. of Estabs. Operated, 1982	Sales, 1982 (mil. $)	Percent of Total					
				Firms		Estabs.		Sales	
				1982	1977	1982	1977	1982	1977
Total	5,858	7,433	$10,948.8##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	5,359	5,359	3,814.9	91.5	97.7	72.1	70.5	34.8	47.9
Multi-unit organizations	499	2,074	7,133.8	8.5	2.3	27.9	29.5	65.2	52.1
Less than 10 establishments	492	731	4,884.0	8.4	na	9.9	4.2	44.6	23.6
10 or more establishments	7	1,343	2,249.8	0.1	na	18.1	25.3	20.5	28.5

##Excludes $304,887,000 in sales of firms not in business at end of year.
na not available

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Retailer Type: Mail Order Houses (With Payroll) SIC Code 5961

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR, 1982*

	No. of Firms	Percent of Total		
		Firms	Estabs.	Sales
Total	5,437	100.0	100.0	100.0
Sales volume of firms:				
$10.0 mil. or more	131	2.4	21.6	70.2
$ 5.0 mil.-$ 9.9 mil.	90	1.7	1.8	6.1
$ 2.5 mil.-$ 4.9 mil.	167	3.1	2.6	5.4
$ 1.0 mil.-$2.49 mil.	466	8.6	7.5	6.5
$ 0.5 mil.-$0.99 mil.	868	16.0	12.8	5.4
Less than $0.5 mil.	3,715	68.3	53.6	6.5

* Figures for 1977 are not available for firms with payroll only. In 1977, there was a total of 9,084 firms in operation, including both those with payroll and those without paid employees. There were 4,847 firms with payroll in operation at the end of the year.

MAIL ORDER ESTABLISHMENTS (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Estabs. 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977**	
			Estabs.	Sales	Estabs.	Sales
Total	6,985	$10,593.1	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	257	6,317.6	3.7	59.6	3.2	53.9
$ 2.5 mil.- $ 4.9 mil.	254	875.0	3.6	8.3	4.1	9.6
$ 1.0 mil.- $ 2.49 mil.	1,093	1,652.4	15.6	15.6	13.3	11.3
$ 0.5 mil.- $ 0.99 mil.	1,380	984.6	19.8	9.3	19.4	6.0
$ 0.25 mil.- $0.49 mil.	1,431	519.6	20.5	4.9	18.7	3.4
Under $0.25 million	2,570	243.9	36.8	2.3	41.3	15.8

** The census showed a total of 6,721 mail order houses with payroll operating the entire year and 10,958 including non-employer establishments. The 4,237 operations which had no paid employees accounted for 38.7% of establishments and 1.6% of sales. Comparable figures are not available for 1982.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Retailer Type: Direct Selling Establishments (With Payroll) SIC Code 5963

Direct sellers with paid employees, including businesses selling house-to-house, by telephone, etc., increased slightly from 1977 to 1982--from 8,370 to 8,724. The largest number of establishments in this classification in 1982, 1,952, specialized in selling major appliances; the second largest number, 1,195, specialized in groceries and other foods. The former accounted for 13.8% of direct seller business; the latter, 16.5%

CONCENTRATION OF LARGEST FIRMS

	No. of Establishments Operated, 1982	Sales, 1982 (mil. $)	Percent of Total 1982 Estabs.	Percent of Total 1982 Sales	Percent of Total 1977 Estabs.	Percent of Total 1977 Sales
All firms#	8,724	$ 4,175.1	100.0	100.0	100.0	100.0
4 largest firms	758	595.4	8.7	14.3	8.9	18.8
8 largest firms	867	813.1	9.9	19.5	10.5	24.7
20 largest firms	1,032	1,154.2	11.8	27.6	12.8	33.0
50 largest firms	1,177	1,506.8	13.5	36.1	14.5	40.7

# Covers firms operating anytime during the year.

FIRM SIZE: NUMBER OF ESTABISHMENTS OPERATED

	No. of Firms 1982	No. of Estabs. Operated, 1982	Sales 1982 (mil. $)	Percent of Total Firms 1982	Firms 1977	Estabs. 1982	Estabs. 1977	Sales 1982	Sales 1977
Total	7,215	8,724	$ 4,094.2##	100.0	100.0	100.0	100.0	100.0	100.0
Single unit organizations	6,774	6,774	2,325.1	93.9	97.3	77.6	79.8	56.8	57.1
Multi-unit organizations	441	1,950	1,769.1	6.1	2.7	22.4	20.2	43.2	42.9
Less than 10 establishments	422	753	906.3	5.9	na	8.6	na	22.1	na
10 or more establishments	19	1,197	862.8	0.3	na	13.8	na	21.1	na
50 or more establishments	5	903	563.9	0.1	na	10.4	na	13.8	na

##Excludes $80,896,000 in sales of firms not in operation at end of year.
na not available

FIRM SIZE: ANNUAL SALES FOR FIRMS IN OPERATION ENTIRE YEAR

	No. of Firms 1982	No. of Firms 1977	Percent of Total Firms 1982	Firms 1977	Establishments 1982	Establishments 1977	Sales 1982	Sales 1977
Total	6,403	6,864	100.0	100.0	100.0	100.0	100.0	100.0
Sales volume of firms:								
$10.0 mil. or more	39	26	0.6	0.4	14.7	14.0	35.2	35.4
$ 5.0 mil.-$ 9.9 mil.	52	26	0.8	0.4	2.0	0.6	9.0	5.7
$ 2.5 mil.-$ 4.9 mil.	106	306	1.7	4.5	1.9	5.9	8.7	19.3
$ 1.0 mil.-$2.49 mil.	418		6.5		6.2		15.7	
$ 0.5 mil.-$0.99 mil.	628	495	9.8	7.2	8.9	6.7	11.0	11.8
Less than $0.5 mil.	5,160	6,011	80.6	87.6	66.3	72.8	20.4	27.7

RETAIL STORE PROFILES: Firms/Stores/Sales (U.S. Total)

Retailer Type: Direct Selling Establishments (With Payroll) SIC Code 5963

ESTABLISHMENTS (IN OPERATION ENTIRE YEAR) BY SALES SIZE

	No. of Establishments 1982	Sales, 1982 (mil. $)	Percent of Total			
			1982		1977*	
			Estabs.	Sales	Estabs.	Sales
Total	7,846	$ 3,912.4	100.0	100.0	100.0	100.0
Annual sales total:						
$ 5.0 mil. or more	64	787.8	0.8	20.1	0.3	13.1
$ 2.5 mil.- $ 4.9 mil.	142	466.4	1.8	11.9	2.2	16.7
$ 1.0 mil.- $ 2.49 mil.	618	923.5	7.9	23.6	5.3	18.7
$ 0.5 mil.- $ 0.99 mil.	981	682.7	12.5	17.4	10.3	17.9
$ 0.25 mil.- $0.49 mil.	1,625	573.9	20.7	14.7	13.8	13.7
Under $0.25 million	4,416	478.1	56.2	12.2	68.1	19.9

* According to the Census, 7,135 direct selling establishments were in operation the entire year 1977.

Note: For information on store classifications, on comparability of 1982 and 1977 figures and other technical information, see INTRODUCTION.

Source: U.S. Bureau of the Census: Census of Retail Trade, 1982, 1977

FAIRCHILD FACT FILES CURRENTLY AVAILABLE

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S. including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now--1985 Edition will be available in February, 1986)

DEPARTMENT STORE SALES: (Including selected major apparel specialty store sales) Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now--1986 Edition available in January)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. (1984 Edition available now--1985 Edition will be available in August, 1985).

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchanising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (Includes a new consumer buying intention survey) (November)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: (Including Tailored Casual Wear) Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (November)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and physical fitness.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (August)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change. For orders and further information, please write to:

FAIRCHILD FACT FILES,
Fairchild Books,
7 East 12th Street, New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C 3400-1.24-5

FAIRCHILD

Sales of Major Classifications of Consumer Goods by Retail Outlet Type

FACT FILE

Market Research Division
Fairchild Publications, New York

Sales of Major Classifications of Consumer Goods by Retail Outlet Type

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst
Kenneth Greenman, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add up to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1986 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-569-0

Printed in the United States of America

TABLE OF CONTENTS

Page

INTRODUCTION.. 1

RETAIL TRADE: MERCHANDISE LINES.......................................2
  TOTAL RETAIL SALES BY MERCHANDISE LINES: 1977, 1982...................3

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS........4
  GROCERIES & OTHER FOODS...4
  DRUGS (INCLUDING PRESCRIPTIONS) HEALTH & BEAUTY AIDS..................6
  DRUG & PROPRIETARY STORES...6
  DRUG STORES...6
  DEPARTMENT STORES...7
    COSMETIC SALES IN DRUG STORES & IN DEPARTMENT STORES.................8

APPAREL: MEN'S & BOYS WEAR (EXCEPT FOOTWEAR)............................8
  REPORTED SALES SHARE SUMMARY BY MAJOR OUTLET TYPE, 1977, 1982..........9
  SALES BY MAJOR TYPE OF RETAIL OUTLET, 1982..(WITH PAYROLL).............9
  SALES OF BOYS' WEAR & SALES OF MEN'S WEAR IN KEY OUTLETS, 1982.........10
  DEPARTMENT STORES...11
  MEN'S & BOYS' WEAR SPECIALTY STORES...................................12
  FAMILY CLOTHING STORES..12
  OTHER SPECIALTY STORES..13

APPAREL: WOMEN'S & CHILDREN'S WEAR (EXCEPT FOOTWEAR) & RELATED PRODUCTS...14
  REPORTED SALES SHARE--SUMMARY BY MAJOR OUTLET TYPE, 1977, 1982..........14
  DEPARTMENT STORES...17
  WOMEN'S READY TO WEAR STORES..18
  OTHER WOMEN'S SPECIALTY STORES..19
  FAMILY CLOTHING STORES..19
  OTHER SPECIALTY STORES..20

FOOTWEAR..21
  SALES OF FOOTWEAR BY CLASSIFICATION IN REPORTING STORE TYPES, 1982......22
  SHOE STORES...23
  DEPARTMENT STORES...24

SPORTING GOODS & RELATED PRODUCTS.......................................25
  SALES BY MAJOR TYPE OF RETAIL OUTLET, 1982............................26
  SPORTING GOODS STORE SALES BY MERCHANDISE LINES 1982..................27
  DEPARTMENT STORES, BOAT DEALERS, ETC..................................28
  ACTIVEWEAR..29

MISCELLANEOUS PRODUCTS (TOYS, GAMES, PHOTO EQUIPMENT, STATIONERY, BOOKS)..30
  MAJOR REPORTING OUTLET TYPES..30

HOMEFURNISHINGS & EQUIPMENT SALES THROUGH RETAIL OUTLETS, 1982............31
  FURNITURE & BEDDING...31
  FURNITURE STORES, DEPARTMENT STORES...................................32
  MAJOR APPLIANCES..33
  HOUSEHOLD APPLIANCE STORES..34
  TV & VIDEO RECORDERS, TAPES, AUDIO EQUIPMENT, MUSICAL INSTRUMENTS & SUPPLIES...36
  CURTAINS, DRAPERIES, DOMESTICS, WINDOW COVERINGS, FLOOR COVERINGS.......37

SCHEDULE OF ADDITIONAL FACT FILES.......................................40

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE

INTRODUCTION

Every five years, starting in 1930, the U.S. Department of Commerce, Bureau of the Census, has collected detailed information on retail trade, nationwide, as part of the economic census program (which also includes manufactures, wholesale trade and service industries).

Included in a series of detailed reports covering the 1982 census of retail trade which has recently been issued by the Census Bureau, are the only available official figures on sales of major classifications of merchandise by type of retail outlet. This Fact File analyzes this particular aspect of the census data.

Unlike the store counts and data on total store sales (covered in detail in the Fairchild Fact File: A STATISTICAL ANALYSIS OF RETAILING), the merchandise line sales information has been developed by the Census Bureau through estimates based on census questionnaires mailed to all large employers and to a 10% sample of the small employers in the retail universe. Retailers without paid employees are not included in the merchandise line estimates developed by the Census Bureau in 1982, and in the previous census covering the year 1977.

There were differences, however, in the methodology followed for each census year which affect comparability--involving changes in product classifications, to a limited extent, but to a more important degree-particularly for footwear, sporting goods, cosmetics, jewelry and women's ready-to-wear as well as other classifications where leased departments account for a significant share of sales. In 1977 and prior censuses, data for leased departments were consolidated with the data for the stores in which they operated (primary general merchandise stores), the lessor. In the 1982 census, each leased department was treated as a separate establishment and was classified according to its kind of business. This has had the effect of increasing the number and sales of specialized retail outlets and of decreasing the sales of stores operating leased departments within their establishments. (On a total store basis, the Census Bureau has reported department store sales in 1982 totaled $107.2 billion including leased departments, $99.2 billion excluding leased departments).

A brief explanation of some of the terms used in the Fact File may be helpful.

Establishments: A single physical location at which business in conducted. It is not necessarily identical with a company or enterprise (firm) which may consist of more than one establishment. Establishments are classified on the basis of their major activity. Only stores with paid employees are included in the 1982 (and 1977) census data (one or more paid employees).

Leased departments: Separately owned businesses operated as departments or concessions within a retail establishment are treated as separate establishments in the 1982 census, as noted above. (Only main store departments are counted, however).

Catalog order desks: These operations within retail stores (such as catalog desks within the Sears Roebuck department store outlets) are included in the data covering the stores in which they are located. Sales attributed to mail order houses cover establishments primarily selling merchandise as a result of orders received by mail.

(continued)

Explanation of terms used in this Fact File (continued)

Kinds of business: Retail establishments are classified by the Census Bureau following the Standard Industrial Classification (SIC) System. Retail trade--major SIC groups 52-59 (1972 SIC Manual)--includes establishments selling merchandise for personal or household consumption and in rendering services incidental to the sale of the goods. Not included are sales at retail made by manufacturers, wholesalers, or other businesses whose primary activity is not retail trade.

For the most part, the store definitions are self-evident in the assigned SIC class. However, some of particular interest in this Fact File require explanation.

Department stores: Stores normally employing 25 people or more, having sales of apparel and soft goods, combined, amounting to 20% or more of total sales, and selling each of the following lines of merchandise:

1. Furniture, homefurnishings, appliances, radio and TV sets.
2. A general line of apparel for the family.
3. Household linens and dry goods (home textiles).

Leased department employment and merchandise lines are taken into account in classifying department stores; however, starting with the 1982 census, leased department sales are not counted in the department store sales total (or in any other type of store in which they are lessees, as explained above.)

To qualify as a department store, sales of each of the three lines noted above must be less than 80% of total store sales. A store with total sales of $10 million or more is classified as a department store even if this condition is not met, provided that the combined sales of the other two are $1 million or more.

Discount stores and outlets operated by general merchandise or mail order chains which meet the above definition are counted as department stores.

RETAIL TRADE: MERCHANDISE LINES

The change in methodology involving leased departments (described on page 1) does not affect total sales by merchandise line, but should be kept in mind when analyzing sales of individual merchandise classifications by store type.

Total Retail Sales By Merchandising Line: 1977, 1982

	Total Establishments Reporting Sales*		Retail Sales (mil. $)		% of Total Sales	
	1982	1977	1982	1977	1982	1977
Retail trade, total	1,330,316	1,303,621	$1,039,028.7	$699,634.9	100.0	100.0
Merchandise Sales						
Groceries & other foods	266,550	271,440	198,704.5	137,506.0	19.1	19.7
Meals & snacks	391,216	340,526	92,676.9	54,734.9	8.9	7.8
Alcoholic drinks	140,366	138,462	14,965.5	9,997.8	1.4	1.4
Packaged alcoholic beverages	157,377	135,649	25,632.6	16,164.2	2.5	2.3
Cigars, cigarettes, tobacco	240,883	231,281	14,664.4	8,475.1	1.4	1.2
Drugs	187,219	110,448	42,337.3	12,438.4	4.1	1.8
Health & beauty aids		165,545		11,325.1		1.6
Apparel						
Men's & boys' wear	104,078	105,875	29,461.0	22,739.7	2.8	3.3
Women's, girls', infants' & toddlers wear**	145,965	138,964	57,552.9	36,526.9	5.5	5.2
Footwear, except infants' & toddlers'**	111,607	97,792	17,016.8	10,649.5	1.6	1.5
Homefurnishings & Related Products						
Sewing, knitting, needlework goods	45,306	81,734	4,132.0	10,010.9	0.4	1.4
Curtains, draperies & other window coverings, home textiles	65,350		8,926.1		0.9	
Major household appliances	61,383	71,966	11,336.6	9,179.2	1.1	1.3
Small electric appliances	69,910	81,725	4,380.8	2,849.4	0.4	0.4
TV's & video recorders, tapes	58,735	55,041	6,841.2	4,128.3	0.7	0.6
Audio equipment (recorders, records, radios, tapes, etc.), musical instruments & supplies	74,084	89,038	11,278.7	9,190.6	1.1	1.3
Furniture & sleep equipment/bedding	67,720	72,389	19,086.0	14,684.6	1.8	2.1
Floor coverings	56,540	65,697	6,907.7	5,770.3	0.7	0.8
Kitchenware, housewares, tabletop, decorative accessories, clock, bath shop, etc.	150,023	137,003	15,642.1	9,881.3	1.5	1.4
Other merchandise						
Jewelry (fine & costume), watches	95,026	110,575	12,133.2	8,150.8	1.2	1.2
Optical goods	21,348	21,231	1,851.0	1,361.2	0.2	0.2
Sporting goods	70,468	79,714	13,038.1	9,451.0	1.3	1.4
Recreational vehicles (campers, trailers, etc.)	5,918	12,718	2,957.4	3,234.1	0.3	0.5
Hardware, tools, plumbing & electrical supplies	102,938	94,218	13,977.9	8,555.3	1.3	1.2
Lawn & garden equipment, supplies	94,938	98,976	11,189.2	7,217.0	1.1	1.0
Lumber & building materials	74,070	nsr	32,179.3	nsr	3.1	3.8
Mobile homes	4,935	nsr	3,795.1	nsr	0.4	—
Cars, trucks, powered vehicles	48,863	55,621	139,687.2	112,285.2	13.4	16.0
Automotive fuels	155,892	211,078	89,288.0	48,736.2	8.6	7.0
Automotive lubricants	156,610		1,849.8		0.3	
Auto tires, batteries, accessories	166,160	194,772	31,050.0	21,196.0	3.0	3.0
Household fuels	20,667	22,984	14,791.4	8,923.4	1.4	1.3
All other merchandise	268,919	289,941	52,892.4	36,682.6	5.1	5.2
Unclassified merchandise	146,751	nsr	5,450.8	nsr	0.5	—
Nonmerchandise receipts from customers excl. sales & other taxes (delivery, repair, storage, rental of equip., etc.)	248,928	262,398	30,354.9	20,824.1	2.9	3.0

(footnotes on next page)

RETAIL TRADE: MERCHANDISE LINES

(footnotes from preceding table)

* Each business location is separately counted as an "establishment" (stores). Included in the reported establishment counts are those with payroll only; non-employers are not included. See the introductory paragraph for information on the change in the treatment of leased departments in 1982.

** Infant's footwear is included in data on "women's, girls', infants', toddlers' wear."

nsr not separately reported.

Source: U.S. Bureau of the Census, Census of Retail Trade
(RC82-1-3, RC77-L)

GROCERIES & OTHER FOODS

In 1982, grocery stores accounted for 89.2% of the total sales of groceries and other foods in stores with payroll. The 128,494 grocery stores reported in the census accounted for 48.2% of the retail outlets with payroll selling groceries and other foods. The balance of business was widely distributed. Meat and seafood markets (4.1% of the covered outlets) held the second largest share of the market--2.6%. Department and other general merchandise stores (7.4% of the outlets) held a 1.6% share of reported sales of groceries and other foods in 1982.

In 1977, grocery stores with payroll accounted for 88.8% of sales of groceries and other foods; meat and seafood markets, 2.4%; general merchandise stores, 2.3%.

Sales of Groceries & Other Foods By Major Type of Retail Outlet, 1982
(Includes only establishments with payroll)

	Number of Establishments	Sales By Outlet Type	
		(thous. $)	% of Total
Groceries & other foods, total	266,550	$198,704,555	100.0
General merchandise group stores	19,760	3,132,239	1.6
Department stores*	7,311	2,487,453	1.3
Food stores	176,219	189,848,375	95.5
Grocery stores	128,494	177,232,953	89.2
Meat & seafood markets	10,995	5,141,388	2.6
Retail bakeries	17,580	3,433,668	1.7
Other specialized food stores (fruit, vegetable markets, candy stores, dairy product stores, etc.)	19,150	4,040,366	2.0
Other outlets	70,571	5,723,941	2.9

* Leased departments are not included.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

Grocery Stores:

Information on the leading outlet type, grocery stores--covering number of firms, sales size, etc.--will be found in the RETAIL STORES PROFILE section of the STATISTICAL ANALYSIS Fact File. Following is a breakdown of the merchandise line sales within grocery stores in 1982.

The trend to broader classifications of merchandise within grocery stores is clearly evident. In 1977, for example, drugs, health and beauty aids accounted for 2.6% of total grocery store sales; in 1982, they represented 4.5%. In 1977, 59% of the grocery stores reported sales of HBA; in 1982, 67% of the grocery stores sold drugs, health and beauty aids.

Grocery Store Sales By Merchandise Line, 1982
(Includes only establishments with payroll)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Grocery stores, total	128,494	100.0	$226,609,085	—	100.0
Major lines sold:					
Groceries & other foods	128,494	100.0	177,232,953	78.2	78.2
Meat, fish, poultry	90,252	70.2	39,392,154	18.7	17.4
Fresh fruits, vegetables	80,701	62.8	15,313,158	7.5	6.8
Frozen foods	89,833	69.9	9,601,993	5.4	4.2
Dairy products	106,210	82.6	16,722,688	8.9	7.4
Bakery products, baked on premises	26,878	20.9	2,344,683	2.6	1.0
Other bakery products, except frozen	70,418	54.8	4,364,955	3.7	1.9
Delicatessen items	56,286	43.8	5,554,361	4.3	2.5
All other foods	121,862	94.8	84,028,961	37.7	37.1
Meals and snacks	37,498	29.2	1,257,100	4.5	0.6
Packaged alcoholic beverages	73,624	57.3	7,507,975	6.1	3.3
Distilled spirits	11,818	9.2	931,142	2.6	0.4
Wine, brandy, brandy spirits	39,130	30.4	1,395,705	1.9	0.6
Beer and ale	71,959	56.0	5,181,128	4.5	2.3
Cigars, cigarettes, tobacco	95,049	74.0	7,596,338	4.6	3.4
Drugs, health aids, beauty aids	85,641	66.6	7,791,797	4.5	3.4
Prescriptions	3,399	2.6	538,160	1.8	0.2
Other drugs, health & beauty aids	85,113	66.2	7,253,637	4.2	3.2
Apparel items, exc. footwear:					
Men's & boys	3,509	2.7	122,617	1.3	0.1
Women's and children's	3,905	3.0	141,980	1.2	0.1
Kitchenware and homefurnishings	17,638	13.7	1,292,552	2.0	0.6
Small electric appliances	3,995	3.1	201,735	1.1	0.1
Books, magazines, newspapers	59,904	46.6	1,606,197	1.6	0.7
Paper products, towels, tissues	69,191	53.8	5,125,159	3.5	2.3
Soaps, detergents, cleaners	69,815	54.3	5,410,390	3.7	2.4
Pet foods	56,773	44.2	3,201,188	2.6	1.4
Other merchandise & misc. receipts (automotive products, hardware, etc.)	—	—	8,121,024	—	3.6

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade, RC82-1-3

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

DRUGS (INCLUDING PRESCRIPTIONS), HEALTH & BEAUTY AIDS

Census Bureau data on sales by type of retail outlet is based on the combined total of all drugs (including prescription and over-the-counter), health and beauty aids, which amounted to $42.3 billion in 1982 sales through 187,219 retail outlets. The inclusion of prescription drugs in the total helped swell the drug and proprietary stores' share of the total to 57.8%. Grocery stores held the second largest share of sales--18.4% of the total, with sales reported in 85,641 stores.

In 1977, sales of health and beauty aids were reported separately from drugs. In that year, drug and proprietary stores (defined as drug stores which do not sell prescriptions) accounted for 36.2% of sales; grocery stores held a 25.6% share of total retail business in health and beauty aids.

Sales of Drugs, Health & Beauty Aids By Major Type of Retail Outlet, 1982
(Includes only establishments with payroll)

	Number of Establishments	Sales By Outlet Type (thous. $)	Sales By Outlet Type % of Total
Drugs, health & beauty aids, total	187,219	$42,337,314	100.0
General merchandise groups stores	27,029	7,450,837	17.6
Department stores*	9,668	6,380,012	15.1
Food stores	92,372	8,506,702	20.1
Grocery stores	85,641	7,791,797	18.4
Apparel & accessory stores	3,202	340,130	0.8
Drug & proprietary stores	49,527	24,461,365	57.8
Drug stores	46,661	23,436,020	55.4
Proprietary stores	2,866	1,025,345	2.4
Other retailers	15,089	1,578,280	3.7

* Leased departments are not included.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Drug & Proprietary Stores

Information on the leading outlet type, drug and proprietary stores, covering the number of firms, sales size, etc., will be found in the RETAIL STORES PROFILE section of the STATISTICAL ANALYSIS Fact File. Following is a breakdown of major merchandise line sales within drug and proprietary stores in 1982. Drugs, health and beauty aids represented 67.5% of the total in 1982 compared with 63.7% of the total in 1977.

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

DRUGS (INCLUDING PRESCRIPTIONS), HEALTH & BEAUTY AIDS

Drug & Proprietary Stores (continued)

Drug & Propriety Store Sales By Major Merchandise Lines, 1982
(Includes only establishments with payroll)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Drug, proprietary stores, total	49,527	100.0	$36,242,417	—	100.0
Major lines sold:					
Groceries & other foods	15,774	2.5	1,243,668	6.8	3.4
Packaged alcoholic beverages	8,796	17.8	1,185,738	6.9	3.3
Cigars, cigarettes, etc.	31,945	64.5	1,790,397	6.3	4.9
Drugs, health & beauty aids	49,527	100.0	24,461,365	67.5	67.5
All other merchandise	49,527	100.0	7,561,249	—	20.9

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Drug Stores

The Census Bureau has published separate figures on merchandise line sales within drug stores excluding proprietary stores (which do not sell prescriptions). This provides greater detail on sales within the drug, health and beauty aids category.

Drug, Health & Beauty Aid Sales in Drug Stores, 1982
(Includes only establishments with payroll)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Drug stores, total	46,661	100.0	$34,940,716	—	100.0
Drugs, health & beauty aid sales total:	46,661	100.0	23,436,020	67.1	67.1
Prescriptions	46,661	100.0	12,982,896	37.2	37.2
Nonprescription medicines	42,664	91.4	3,915,564	12.3	11.2
Health aids	33,865	72.6	1,858,237	7.0	5.3
Cosmetics	33,913	72.7	2,180,555	7.4	6.2
Other hygiene needs	32,003	68.6	2,498,768	9.6	7.2

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Cosmetics, including makeup, face creams and lotions, fragrances, etc., represented 6.2% of total drug store sales in 1982, up from 5.7% in 1977.

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

DRUGS (INCLUDING PRESCRIPTIONS), HEALTH & BEAUTY AIDS

Department Stores

Drug, Health & Beauty Aid Sales in Department Stores, 1982

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Department stores, total	9,981	100.0	$99,170,163	—	100.0
Drugs, health & beauty aid sales total:	9,668	96.9	6,380,012	6.5	6.4
Prescriptions	2,471	24.8	625,087	2.7	0.6
Cosmetics	9,328	93.5	3,848,864	4.0	3.9
Other drugs, health aids, beauty aids	7,482	75.0	1,906,060	2.7	1.9

* Leased departments are not included. See page 1.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Cosmetics

In 1982 census of retail trade reports, information on cosmetics sales is separately reported for only two store types: drug stores and department stores. However, sales through leased departments are not included in these figures.

Recap: Cosmetics Sales in Drug Stores & in Department Stores, 1982

	No. of Stores	Sales (thous. $)	Percent
Cosmetics sales: reported total*	43,241	$6,029,419	100.0
Drug stores	33,913	2,180,555	36.2
Department stores	9,328	3,848,864	63.8

* Leased departments are not included in the stores in which they operated, but are counted as separate specialized retail establishments. See page 1.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

APPAREL: MEN'S & BOYS' WEAR (EXCEPT FOOTWEAR)

Total sales of men's and boys' wear, excluding footwear, amounted to $29.5 billion in 1982 based on reports covering 104,078 retail outlets with payroll. This compares with sales totaling $22.7 billion in 105,875 retail outlets with payroll in 1977. (Dollar figures are on a current dollar basis, and not adjusted for inflation).

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

APPAREL: MEN'S & BOYS' WEAR (EXCEPT FOOTWEAR)

The change in the treatment of leased departments--not included in the sales of the stores in which the leased departments were operated in 1982, as they were in 1977--affects comparability in sales share by outlet type to varying degrees, depending on store type and merchandise type (but not total dollar volume). However, as reported, the data indicates a decline in the market share held by stores classified as department stores and men's and boys' clothing and furnishings stores, while family clothing stores and other outlets have picked up sales share. With the boom in demand for activewear, sporting goods stores increased their share of overall men's and boys' wear business from 0.8% to 1.8%. (See section on SPORTING GOODS & RELATED PRODUCTS).

Men's & Boy's Wear Sales: Reported Sales Share Summary By Major Retail Outlet Type, 1977, 1982

	Number of Establishments		Men's & Boys' Wear Sales			
			Millions of $		Percent	
	1982	1977	1982	1977	1982	1977
Men's & boys' wear, reported total	104,078	105,875	$29,461	$22,740	100.0	100.0
Department stores	9,947	8,807	12,812	10,575	43.5	46.5
Men's & boys' wear stores	17,480	20,643	7,053	6,275	23.9	27.6
Family clothing stores	17,859	15,950	5,253	3,001	17.8	13.2
Other retail outlets	58,792	60,475	4,343	2,889	14.8	12.7

Source: U.S. Bureau of the Census,
1977, 1982 Censuses of Retail Trade

Sales of Men's & Boys' Wear By Major Type in Specified Stores, 1982
(Includes only establishments with payroll)

	Number of Establishments	Sales By Outlet Type	
		(thous. $)	% of Total
Men's & boys' wear, except footwear, total	104,078	$29,461,020	100.0
General merchandise group stores*	29,005	14,175,991	48.1
Department stores*	9,947	12,812,001	43.5
Apparel & accessory stores	48,335	13,534,908	45.9
Men's & boys' wear stores	17,480	7,052,585	23.9
Family clothing stores	17,859	5,253,303	17.8
Women's wear stores	3,990	459,404	1.5
Other, including shoe stores	9,006	769,616	2.6
Sporting good stores	9,061	543,697	1.8
Nonstore retailers:			
Mail order houses**	3,323	734,511	2.5
Direct selling establishments	288	36,959	0.1
All other retailers	14,066	434,954	1.6

* Leased departments are not included.
** Catalog order desks are included in the sales of the stores in which they are operated.

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

APPAREL: MEN'S & BOYS' WEAR (EXCEPT FOOTWEAR)

Information on sales of men's wear and on boys'/young men's/students' wear has been separately reported for key stores, representing a combined total of $25.9 billion--87.9% of the reported total in men's and boys' wear for all outlets with payroll. Where separately reported, men's wear amounted to $21.3 billion (82.3%); boys' wear, $4.6 billion (17.7%).

Men's & Boys' Wear Sales Separately Reported For Key Outlet Types, 1982
(Retail establishments with payroll)

	Number of Establishments	Reported Sales	
		Thous. $	Percent
Men's wear, (excluding footwear) total reported	--	$21,303,758	100.0
Department stores	9,947	9,606,115	45.1
Men's wear stores	17,480	6,741,742	31.6
Family clothing stores	17,859	4,583,566	21.5
Women's wear stores	na	372,335	1.7
Boy's, young men's, students' wear (exc. footwear, total reported)	31,878	4,596,820	100.0
Department stores	9,835	3,205,886	69.7
Men's & boys' wear stores	4,288	310,843	6.8
Family clothing stores	12,516	669,737	14.6
Women's wear stores	1,793	87,069	1.9
Children's wear stores	3,446	323,285	7.0

na not available

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade RC82-1-3

Men's & Boys' Wear Sales

Reported Sales of Men's Wear Merchandise Classifications In Major Store Types, 1982
(Dollar sales in millions)

	Dept. Stores		Men's Wear Stores		Family Clothing Stores	
	$ Sales	Percent	$ Sales	Percent	$ Sales	Percent
Men's wear, reported total	$9,606.1	100.0	$6,741.7	100.0	$4,583.6	100.0
Overcoats, topcoats, raincoats, outerjackets	773.9	8.1	579.1	8.6	397.3	8.7
Suits, formal wear	542.0	5.6	1,489.1	22.1	311.4	6.8
Sport coats, blazers	531.7	5.5	809.8	12.0	235.9	5.1
Dress & casual slacks, jeans, walking shorts	1,751.7	18.2	1,417.3	21.0	1,503.9	32.8
Career & work uniforms	269.4	2.8	171.5	2.5	109.2	2.4
Shirts, knit & woven, dress & sport	2,128.0	22.1	1,181.6	17.5	1,051.7	22.9
Sweaters	552.5	5.8	332.8	4.9	240.1	5.2
Hosiery, pajamas, robes, underwear	1,200.7	12.5	184.9	2.7	228.4	5.0
Activewear	796.9	8.3	174.5	2.6	287.2	6.3
Accessories	1,059.3	11.1	401.3	6.0	218.6	4.8

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

APPAREL: MEN'S & BOYS' WEAR (EXCEPT FOOTWEAR)

Department Stores

Details on the leading outlet type--department stores--in terms of number of stores, total store sales, etc., has been covered in detail in the Fact File: A STATISTICAL ANALYSIS OF RETAILING. As noted, on page 10 of this report, department stores accounted for 43.5% of reported sales of men's and boys' wear--45.1% of men's wear (where separately reported) and 70% of boys'/young men's/students' wear (where separately reported).

Men's & Boys' Wear Sales in Department Stores, 1982
(Not including leased departments)

			Sales of specified merchandise line		
				Percent of total sales of	
	Establishments		Amount	Estabs. selling	All
	Number	Percent	(thous. $)	the line	Estabs.
Department stores, total	9,981	100.0	$99,170,163	—	100.0
Men's & boys' wear, except footwear	9,947	99.7	12,812,001	12.9	12.9
Men's wear, total	9,947	99.7	9,606,115	—	9.7
Overcoats, topcoats, raincoats, outerjackets	6,446	64.6	773,908	1.0	0.8
Suits and formal wear	3,816	38.2	541,974	1.0	0.5
Sport coats and blazers	4,606	46.1	531,700	0.8	0.5
Tailored and dress slacks, casual slacks, jeans, walking shorts	8,419	84.4	1,751,702	2.0	1.8
Career & work uniforms	4,819	48.3	269,447	0.6	0.3
Shirts, knit & woven, dress & sport	8,328	83.4	2,127,968	2.4	2.1
Sweaters	5,796	58.1	552,451	0.8	0.6
Hosiery, pajamas, robes, underwear	8,242	82.6	1,200,734	1.4	1.2
Activewear (tennis, golf, jogging, swimming, etc.)	6,931	69.4	796,943	1.0	0.8
Accessories	7,012	70.2	1,059,288	1.3	1.1
Boys' (sizes 2 to 16), young men's (sizes 13 to 20) and students' (sizes 32 to 44) clothing & accessories*	9,835	98.5	3,205,886	3.3	3.2

* Data on infants' and toddlers' (boys') is combined with girls' and will be found with information on Children's Wear.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

APPAREL: MEN'S & BOYS' WEAR (EXCEPT FOOTWEAR)

Men's & Boys' Wear Specialty Stores

The STATISTICAL ANALYSIS OF RETAILING Fact File covers details on total men's and boys' wear stores by size, number of firms, sales, concentration, etc. Following is a breakdown of sales in terms of merchandise classifications.

Men's & Boys' Wear Sales in Men's & Boys' Wear Stores, 1982
(Includes only establishments with payroll)

	Establishments		Sales of specified merchandise line	Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Men's & boys' wear stores, total	17,480	100.0	$ 7,734,522	—	100.0
Men's & boys' wear, except footwear	17,480	100.0	7,052,585	91.2	91.2
Men's wear, total	17,480	100.0	6,741,742	—	87.1
Overcoats, topcoats, raincoats, outerjackets	13,124	75.1	579,066	9.4	7.5
Suits and formal wear	11,638	66.6	1,489,066	26.0	19.3
Sport coats & blazers	12,164	69.6	809,768	13.7	10.5
Tailored and dress slacks, casual slacks, jeans, walking shorts	15,038	86.0	1,417,266	20.6	18.3
Career & work uniforms	2,269	13.0	171,480	18.8	2.2
Shirts, knit & woven, dress & sport	15,299	87.5	1,181,587	17.2	15.3
Sweaters	12,711	72.7	332,810	5.8	4.3
Hosiery, pajamas, robes, underwear	9,655	55.2	184,881	4.0	2.4
Activewear (tennis, golf, jogging, swimming, etc.)	7,923	45.3	174,505	4.6	2.4
Accessories	13,547	77.5	401,313	6.6	5.2
Boys' (sizes 2 to 16), young men's (sizes 13 to 20) and students' (sizes 32 to 44) clothing & accessories*	4,288	24.5	310,843	14.7	4.0

* See footnote on preceding table covering department stores

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Family Clothing Stores

These stores primarily sell clothing, furnishings and accessories for men, women and children, without specializing in any one line, and sales of all types of apparel account for 50% or more of their total sales. Men's and boys' wear business (which by store definition cannot exceed in total more than three times the sales of all women's and girls' apparel) was reported as noted below in the 1982 census.

Adjusted for comparable treatment of leased departments in 1977 and 1982, mens' and boys' wear, except footwear, accounted for 38.6% of total store sales in 1977 vs. 39.1% in 1982.

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

APPAREL: MEN'S & BOYS' WEAR (EXCEPT FOOTWEAR)

Family Clothing Stores

Men's & Boys' Wear Sales in Family Clothing Stores, 1982
(Includes only establishments with payroll)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Family clothing stores, total	17,859	100.0	$13,451,003	—	100.0
Men's & boys' wear, except footwear	17,859	100.0	5,253,303	39.1	39.1
Men's wear, total	17,859	100.0	4,583,566	—	34.1
Overcoats, topcoats, raincoats, outerjackets	10,500	58.8	397,329	4.3	3.0
Suits and formal wear	6,596	36.9	311,368	5.0	2.3
Sport coats & blazers	8,073	45.2	235,859	3.2	1.8
Tailored and dress slacks, casual slacks, jeans, walking shorts	14,809	82.9	1,503,927	12.7	11.2
Career & work uniforms	4,407	24.7	109,179	2.9	0.8
Shirts, knit & woven, dress & sport	15,238	85.3	1,051,682	8.8	7.8
Sweaters	9,507	53.2	240,081	2.9	1.8
Hosiery, pajamas, robes, underwear	8,961	50.2	228,362	3.0	1.7
Activewear (tennis, golf, jogging, swimming, etc.)	8,713	48.8	287,178	3.3	2.1
Accessories	10,206	57.1	218,601	2.7	1.6
Boys' (sizes 2 to 16), young men's (sizes 13 to 20) and students' (sizes 32 to 44) clothing & accessories*	12,516	70.1	669,737	6.0	5.0

* See footnote on preceding table covering department stores.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Other Specialty Stores

Among 3,301 women's ready-to-wear stores reporting sales of men's and/or boys' wear in 1982, this merchandise classification amounted to $436.1 million, or 12.9% of the sales of stores selling this classification; 2.2% of total women's ready-to-wear store sales.

Sales of men's and/or boys' wear amounted to $23.3 million in 689 women's accessory and specialty stores; $84.5 million in 1,656 shoe stores. Men's and/or boys' wear sales in 7,350 specialized apparel stores primarily selling uniforms, sports apparel, riding apparel, or other specialties, totaled $685.1 million in 1982. Sales of boys' and young men's wear in stores classified as primarily "children's wear stores" amounted to $323.3 million in 3,466 stores. Among sporting goods stores reporting sales of men's and or/boys' wear (9,061 stores), these sales represented 13.3% of their total volume, and accounted for 7.2% of overall total sporting goods/bicycle shop sales.

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

APPAREL: WOMEN'S & CHILDREN'S WEAR (EXCEPT FOOTWEAR) & RELATED PRODUCTS

Total retail sales of women's and children's wear, excluding footwear, amounted to $57.5 billion in 1982 in 145,965 retail outlets with payroll. Comparable 1977 census figures (current dollars) showed total sales of women's and children's wear at $36.5 billion, 138,964 retail outlets with payroll.

The change in treatment of leased departments--which were not included in the sales of stores in which the leased departments were operated in 1982, as they were in 1977--affects comparability in sales share by outlet type to varying degrees, depending on store type and merchandise type (but does not change total dollar sales). The change would tend to increase sales share of specialty outlets, since leased departments are now counted as separate retail establishments, and decrease sales share of general merchandise stores to the extent involved. Information from the Census Bureau indicates that a significant number of leased women's ready-to-wear departments were counted as ready-to-wear stores in 1982.

As reported, department store share of women's and children's wear business declined from 44.5% in 1977 to 40.9% in 1982, while women's ready-to-wear stores increased their share from 30.3% to 33.0%. Family clothing stores (selling men's, women's and children's wear, without specializing in any one category) registered an increase in share of women's and children's wear sales from 9.5% in 1977 to 11.1% in 1982.

Women's & Children's Wear Sales: Reported Sales Share Summary By Major Retail Outlet Type, 1977, 1982

	Number of Establishments		Women's & Childrens' Wear Sales			
			Billions of $		Percent	
	1982	1977	1982	1977	1982	1977
Women's & children's wear, reported total	145,965	138,964	$57.5	$36.5	100.0	100.0
Department stores	9,954	8,807	23.5	16.2	40.9	44.5
Women's ready-to-wear stores	44,163	39,412	19.0	11.1	33.0	30.3
Women's accessory & specialty stores & furriers	6,798	4,962	1.6	0.9	2.8	2.4
Family clothing stores	17,859	15,950	6.4	3.5	11.1	9.5
Other retail outlets	67,191	69,833	7.0	4.8	12.2	13.3

Source: U.S. Bureau of the Census,
1977, 1982 Censuses of Retail Trade

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

APPAREL: WOMEN'S & CHILDREN'S WEAR (EXCEPT FOOTWEAR) & RELATED PRODUCTS

Sales of Women's & Children's Wear in Specified Stores, 1982
(Includes only establishments with payroll)

	Number of Establishments	Sales By Outlet Type	
		(thous. $)	% of Total
Women's & children's wear, except footwear, total	145,965	$57,552,885	100.0
General merchandise group stores*	29,872	25,915,732	45.0
Department stores	9,954	23,511,295	40.9
Variety stores	10,091	1,189,429	2.1
Other general merchandise stores	9,827	1,215,006	2.1
Apparel & accessory stores	86,507	28,987,857	50.4
Women's wear specialty stores, total	50,961	20,622,529	35.8
Women's ready-to-wear stores	44,163	18,984,687	33.0
Women's & accessory & specialty stores, & furriers	6,798	1,637,842	2.8
Family clothing stores	17,859	6,404,121	11.1
Shoe stores	4,016	129,071	0.2
Other apparel accessory stores	10,613	1,553,809	2.7
Children's & infants' wear stores	5,312	974,406	1.7
Sporting good stores	8,413	393,452	0.7
Nonstore retailers:	3,817	1,544.476	2.7
Mail order houses**	3,459	1,491,604	2.6
Direct selling establishments	336	50,402	0.1
All other retailers	17,356	711,368	1.2

* Leased departments are not included in lessor stores, but are counted as separate stores.

** Catalog order desks are included in the sales of the stores in which they are operated.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Information on sales of women's wear and on sales of children's wear (infants'/girls') has been separately reported for key stores, representing a total of $51.7 billion in women's and children's wear -- 90% of the total of $57.5 billion in reported sales in all outlets with payroll.

Women's wear represented 87.6%, or $45.3 billion in sales. Children's wear represented 12.4% of the total, or $6.4 billion.

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

APPAREL: WOMEN'S & CHILDREN'S WEAR (EXCEPT FOOTWEAR) & RELATED PRODUCTS

Women's & Children's Wear Sales Separately Reported For Key Outlet Types, 1982

(Retail establishments with payroll)

	Number of Establishments	Sales	
		Thous. $	Percent
Women's wear, reported total	81,832	$45,330,196	100.0
Department stores	9,954	19,182,873	42.3
Women's ready-to-wear stores	44,163	18,612,103	41.1
Women's accessory & specialty stores	6,798	1,624,526	3.6
Family clothing stores	17,859	5,640,793	12.4
Men's wear stores	3,058	269,901	9.6
Children's wear* reported total	31,666	$ 6,412,810	100.0
Department stores	9,889	4,328,422	67.5
Women's ready-to-wear stores	5,915	372,584	5.8
Women's accessory & specialty stores	286	13,316	0.2
Family clothing stores	9,854	763,328	11.9
Children's wear stores	5,325	926,734	14.5
Men's wear stores	397	8,426	0.1

* Includes boy/girl infants' and toddlers' wear (including infants' footwear), girls' wear (sizes 3-14) and subteen (sizes 6-16) clothing and accessories.

Reported Sales of Women's Wear Classifications In Major Store Types, 1982

(Dollar sales in millions)

	Dept. Stores		Women's Ready-To-Wear Stores		Family Clothing Stores	
	$ Sales	Percent	$ Sales	Percent	$ Sales	Percent
Women's wear, reported total	$19,183	100.0	$18,612	100.0	$5,641	100.0
Dresses, all types	2,323	12.1	3,739	20.1	541	9.6
Coats, outerjackets, rainwear	1,059	5.5	1,400	7.5	331	5.9
Suits, pantsuits, jackets, blazers	1,481	7.7	2,381	12.8	448	7.9
Pants, jeans, walking shorts, skirts	2,911	15.2	3,284	17.6	1,210	21.4
Tops (knit & woven), blouses, sweaters, etc.	3,511	18.3	4,112	22.1	1,483	26.3
Activewear (tennis, jogging, swimming, etc.)	1,212	6.3	887	4.8	344	6.1
Furs, fur garments	153	0.8	112	0.6	16	0.3
Legwear	1,516	7.9	433	2.3	212	3.8
Foundations	1,182	6.2	385	2.1	281	5.0
Intimate apparel	2,023	10.5	674	3.6	368	6.5
Hats, wigs, hairpieces, etc.	73	0.4	26	0.1	17	0.3
Accessories	1,557	8.1	1,000	5.4	325	5.8
Other (aprons, uniforms, smocks, etc.)	182	0.9	181	1.0	64	1.1

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

APPAREL: WOMEN'S & CHILDREN'S WEAR (EXCEPT FOOTWEAR) & RELATED PRODUCTS

Department Stores

Women's & Children's Wear & Related Product Sales in Department Stores, 1982

(Not including leased departments)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of:	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Department stores, total	9,981	100.0	$99,170,163	—	100.0
Women's & children's wear, except footwear, total	9,954	99.7	23,511,295	23.8	23.7
Children's wear*	9,889	99.1	4,328,422	4.4	4.4
Women's wear, total	9,954	99.7	19,182,873	19.4	19.3
Furs & fur garments	1,999	20.0	153,283	0.5	0.2
Dresses, all types	6,453	64.6	2,323,246	3.0	2.3
Dress & tailored coats, outerjackets rainwear	5,833	58.4	1,059,171	1.5	1.1
Suits, pantsuits, sport jackets, blazers	5,492	55.0	1,481,081	2.2	1.5
Slacks/pants, jeans, walking shorts, skirts	6,073	60.8	2,911,185	3.8	2.9
Tops (knit & woven shirts, blouses, sweaters)	6,105	61.6	3,510,668	4.6	3.5
Activewear (tennis, golf, jogging, swimming, etc.)	6,175	61.9	1,211,621	1.6	1.2
Legwear (pantyhose, socks, tights, etc.)	9,666	96.8	1,515,715	1.6	1.5
Foundations (bras, girdles, etc.)	6,914	69.3	1,182,364	1.5	1.2
Intimate apparel (lingerie, sleepwear, daywear)	7,317	73.3	2,022,540	2.4	2.0
Hats, wigs, hairpieces	2,882	28.9	72,700	0.2	0.1
Accessories (handbags, wallets, neckwear, handkerchiefs, gloves, belts, umbrellas, etc., not incl. jewelry)	6,383	63.9	1,557,397	2.0	1.6
Other women's wear**	3,103	31.1	181,902	0.4	0.2
Related products:					
Women's & girls' footwear	5,092	51.0	1,704,678	2.5	1.7
Children's footwear	3,007	30.1	157,975	0.4	0.2
Sewing, knitting, needlework goods	7,581	76.0	770,566	1.0	0.8
Jewelry	8,341	83.6	2,146,428	2.4	2.2
Precious gems, pearls	3,925	39.3	565,494	1.0	0.6
Watches, rings, novelty jewelry, other jewelry	8,219	82.3	1,580,934	1.8	1.6
Luggage & leather goods	4,438	44.4	376,351	0.6	0.4
Optical goods	1,974	19.8	56,013	0.2	0.1

* Includes boy/girl infants' and toddlers' (including footwear), girls' (sizes 3-14) and subteen (sizes 6-16) clothing and accessories.

**Includes aprons, uniforms, smocks and miscellaneous items not elsewhere classified.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

APPAREL: WOMEN'S & CHILDREN'S WEAR (EXCEPT FOOTWEAR) & RELATED PRODUCTS

For details on department stores, including number, sales concentration, etc., see the STATISTICAL ANALYSIS OF RETAILING Fact File (Special Edition: 1985).

Women's Ready-to-Wear Stores

Specialty stores that sell dresses, skirts, slacks, coats, and suits are classified as "ready-to-wear" stores, as distinct from those specializing in accessories or very specialized lines.

Information on the number of stores by sales size, number of firms, etc., will be found in the STATISTICAL ANALYSIS OF RETAILING FACT FILE (Special Edition: 1985).

In 1982, women's ready-to-wear stores (with payroll) reported sales of women's and children's wear (excluding footwear) amounting to $18,984 million, in 44,163 stores. Following is a breakdown of sales by merchandise line.

Women's & Children's Wear Related Product Sales In Women's Ready-to-Wear Stores, 1982

(Includes only establishments with payroll)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Women's & children's wear stores, total	44,163	100.0	$20,248,922	—	100.0
Women's & children's wear, except footwear, total	44,163	100.0	18,984,687	93.8	93.8
Infants', toddlers', girls' subteen wear	5,915	13.4	372,584	8.5	1.8
Women's wear, total	44,163	100.0	18,612,103	85.3	92.0
Furs & fur garments	2,629	6.0	112,116	4.6	0.6
Dresses, all types	40,086	90.8	3,738,760	19.8	18.5
Dress & tailored coats, jackets rainwear	26,152	59.2	1,399,842	9.3	6.9
Suits, pantsuits, sport jackets, blazers	30,397	68.8	2,381,294	15.4	11.8
Slacks/pants, jeans, walking shorts, skirts	37,649	85.2	3,283,800	18.9	16.2
Tops (knit & woven shirts, blouses, sweaters)	37,668	85.3	4,111,671	23.2	20.3
Activewear (tennis, golf, jogging, swimming, etc.)	21,334	48.3	886,904	7.7	4.4
Legwear (pantyhose, socks, tights, etc.)	18,252	41.3	432,584	4.0	2.1
Foundations (bras, girdles, etc.)	14,395	32.6	384,740	4.6	1.9
Intimate apparel (lingerie, sleepwear, daywear)	21,234	48.1	673,774	6.0	3.3
Hats, wigs, hairpieces	2,474	5.6	25,680	2.0	0.1
Accessories	28,292	64.1	1,000,231	6.8	4.9
Other women's wear**	4,246	9.6	180,707	6.9	0.9
Related products:					
Women's & girls' footwear	3,486	7.9	300,411	10.6	1.5
Jewelry, watches, etc.	6,995	15.8	133,061	2.9	0.7

* and ** see footnotes on preceding table covering Department Stores.

# See "Accessories" in Department Stores.

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade RC82-1-3

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

APPAREL: WOMEN'S & CHILDREN'S WEAR (EXCEPT FOOTWEAR) & RELATED PRODUCTS

Other Women's Specialty Stores

Women's & Children's Wear & Related Products Sales
In Accessory & Specialty Stores & Furriers, 1982
(Includes only establishments with payroll)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Women's specialty stores, furriers n.e.c., total	6,798	100.0	$1,740,417	—	100.0
Women's & girls' wear, except footwear	6,798	100.0	1,637,842	94.1	94.1
Selected products:					
Activewear	1,817	26.7	164,765	42.6	9.5
Legwear	2,273	33.4	89,373	22.7	5.1
Foundations	1,812	26.7	119,428	32.0	6.9
Intimate apparel	1,929	28.4	135,254	32.8	7.8
Hats, wigs, hairpieces	811	11.9	40,142	34.9	2.3
Accessories	2,030	29.9	208,378	45.5	12.0
Furs & fur garments	1,080	15.9	614,924	90.4	35.3
Children's & infants' wear stores, total	5,325	100.0	1,356,029	—	100.0
Infants', toddlers, girls' wear except footwear	5,325	100.0	926,734	68.7	68.3
Children's footwear	442	8.3	9,294	8.8	0.7
Furniture & related products	310	5.8	6,119	4.5	0.5
Boys' wear	3,446	64.7	323,285	32.7	23.8
Other merchandise/receipts	—	—	90,597	—	6.7

n.e.c. not elsewhere classified
* See footnote on department store table for description of "children's wear".

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Family Clothing Stores

These stores accounted for 11.1% of women's and children's wear sales in retail outlets with payroll in 1982. They are defined by the Census Bureau as stores primarily selling apparel for men, women and children, without specializing in any one line, and sales of apparel account for 50% or more of their total sales. Women's and children's wear business (which by store definition cannot exceed in total more than three times the sales of all men's and boys' wear) was reported as noted in the following table in the 1982 census.

(For details on total sales and number of stores by size, see the Fact File, A STATISTICAL ANALYSIS OF RETAILING.

APPAREL: WOMEN'S & CHILDREN'S WEAR (EXCEPT FOOTWEAR) & RELATED PRODUCTS

Family Clothing Stores (continued)

Women's & Children's Wear Related Product Sales In Family Clothing Stores, 1982
(Not including leased departments)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Family clothing stores, total	17,859	100.0	$13,451,003	—	100.0
Women's & children's wear, except footwear, total	17,859	100.0	6,404,121	47.6	47.6
Children's wear*	9,854	55.2	763,328	8.0	5.7
Women's wear, total	17,859	100.0	5,640,793	—	41.9
Furs & fur garments	592	3.3	15,824	1.7	0.1
Dresses	10,637	59.6	540,499	5.3	4.0
Dress coats, jackets, rainwear	9,736	54.5	331,000	3.3	2.5
Suits, sport jackets, blazers	9,727	54.5	447,968	5.4	3.3
Slacks, jeans, pants, skirts	14,760	82.6	1,209,644	11.3	9.0
Tops (shirts, blouses, sweaters)	15,353	86.0	1,483,063	12.4	11.0
Activewear	9,829	55.0	344,437	4.2	2.6
Legwear, tights	8,658	48.5	212,370	2.4	1.6
Foundations	7,807	43.7	281,436	3.3	2.1
Intimate apparel	8,785	49.2	368,337	4.1	2.7
Hats, wigs, hairpieces	2,556	14.3	17,382	0.6	0.1
Accessories#	10,728	60.1	325,227	3.1	2.4
Other women's wear**	3,666	20.5	63,606	1.8	0.5
Women's & girls' footwear	7,920	44.3	404,177	5.2	3.0
Children's footwear	4,227	23.7	102,402	2.6	0.8
Jewelry & watches	4,708	26.4	103,526	1.8	0.8

* and ** see footnotes on Department Store table.
# See listing in department store table for description of "accessories".

Other Specialty Stores

Sales of women's and children's wear were reported in 3,058 stores, as noted in the table covering sales by major type of outlet. In these stores, this merchandise represented 12.9% of their total store volume in 1982. In specialized stores which sell such items as uniforms, riding apparel, sports apparel or other specialties, sales of women's and girls' wear amounted to $1.5 billion in 10,613 stores. Of 36,277 shoe stores, 4,016 reported sales of women's and children's wear in 1982, amounting to $129.1 million -- or 9.6% of total store volume.

Of 20,152 sporting goods stores of all types (with payroll), 8,413 reported sales of women's/girls' wear in 1982 amounting to $393.4 million. (Sales of women's activewear in other major retail outlet types have been covered in foregoing tables, but also see the section in this Fact File on SPORTING GOODS & RELATED PRODUCTS.)

(continued)

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

APPAREL: WOMEN'S & CHILDREN'S WEAR (EXCEPT FOOTWEAR) & RELATED PRODUCTS

Other Specialty Stores (continued)

Sales of related merchandise in specialized outlets are covered in the following table.

Sales in Selected Specialty Stores, 1982

(Includes only establishments with payroll)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Jewelry stores, total	22,786	100.0	$ 8,352,447	—	100.0
Jewelry	22,786	100.0	7,288,205	87.3	87.3
Diamonds	20,297	89.1	2,875,741	36.7	34.4
Other precious gems, pearls	15,360	67.4	726,959	13.0	8.7
Rings, except diamonds, precious gems, pearls	17,324	76.0	606,814	10.0	7.3
Watches	19,513	85.6	1,053,172	13.9	12.6
Karat gold jewelry	18,650	81.8	1,203,399	17.4	14.4
Other jewelry	16,800	73.7	822,120	13.9	9.8
Other merchandise & receipts —	—	—	1,064,242	—	12.7
Luggage/leather goods stores, total	1,883	100.0	589,391	—	100.0
Luggage & leather goods	1,883	100.0	509,248	86.4	86.4
Other merchandise & receipts	1,883	100.0	80,143	—	13.6
Sewing, needlework, piece goods stores, total	9,774	100.0	2,494,676	—	100.0

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC-82-1-3

FOOTWEAR

Sales of footwear (except infants' and toddlers') and footwear accessories (polishes, laces, etc.) in retail outlets with payroll reached a reported total of $17.0 billion in 1982 (current dollars), compared with $10.6 billion in 1977. In the 1982 census, 111,607 retail outlets with payroll reported footwear sales; in the 1977 census, there were 97,792.

However, a factor in the increase in outlets is the change in the method of reporting on leased departments. As noted in the introduction to this section, in 1982 data, leased department operations were counted as separate retail establishments--in the case of footwear, as shoe stores. In 1977, leased department operations were not separately reported, but were included in data on the stores in which they were operated. This, of course, affects the comparability of sales share by outlet type in 1982 vs. 1977.

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

FOOTWEAR

Sales of Footwear (Except Infants' & Toddlers') & Related Products By Major Type of Retail Outlet, 1982

(Includes only establishments with payroll)

	Number of Establishments	Sales by Outlet Type (thous. $)	Sales by Outlet Type % of Total
Footwear and footwear accessories sales, reported total	111,607	$17,016,801	100.0
General merchandise group stores*	22,703	3,301,284	19.4
Department stores*	5,290	2,685,558	15.8
Apparel & accessory stores, incl, shoe stores	57,443	12,545,280	73.7
Men's & boys' wear stores	5,242	291,242	1.7
Women's wear stores	4,322	356,852	2.1
Family clothing stores	9,317	870,589	5.1
Shoe stores	36,277	10,958,441	64.4
Men's shoe stores	4,153	1,075,221	6.3
Women's shoe stores	7,832	2,576,756	15.1
Children's & juveniles' shoe stores#	994	215,657	1.3
Family shoe stores	23,298	7,090,807	41.7
Other apparel & accessory stores	2,285	68,156	0.4
Children's/infants' wear stores#	474	12,655	0.1
Sporting goods stores	9,253	518,343	3.0
Nonstore retailers	3,313	354,858	2.1
Mail order houses**	3,201	312,269	1.8
Direct selling establishments	112	42,589	0.3
Other retailers	18,895	297,026	1.8

* Leased departments are not included. See page 21.

** Catalog order desks are included in the sales of the stores in which they are operated.

# Infants' and toddlers' footwear is not included in the above table. This classification is included in sales of "children's wear".

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC-82-1-3

Sales of Footwear by Classification in Reporting Store Types, 1982

Reported sales of footwear by classification amounted to $14,754 million in 1982--86.7% of the total of all footwear and footwear accessories reported at $17,017 million. Of the footwear total men's and boys' footwear amounted to $5,168 million (35.0%); women's and girls', $8,008 million (54.3%); children's (not including infants' and toddlers'), $1,578 million (10.7%).

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

FOOTWEAR

Sales of Footwear by Classification in Reporting Store Types, 1982 (continued)

The $14,754 million in reported sales by shoe/outlet types was distributed as shown in the following table.

	Establishments		Footwear Sales	
	Number	Percent	Thous. $	Percent
Men's & boys' footwear reported total	48,890	100.0	$5,168,430	100.0
Shoe stores	29,378	60.1	3,741,271	72.4
Department stores	4,814	9.8	801,538	15.5
Men's & boys' wear stores	5,081	10.4	252,410	4.9
Women's wear stores	846	1.7	19,903	0.4
Family clothing stores	8,693	17.8	352,213	6.8
Children's wear stores	78	0.2	1,095	*
Women's & girls' footwear reported total	49,775	100.0	8,008,075	100.0
Shoe stores	31,626	63.5	5,545,367	69.2
Department stores	5,092	10.2	1,704,678	21.3
Women's wear stores	4,095	8.2	323,184	4.0
Men's & boys' wear stores	975	2.0	28,672	0.4
Family clothing stores	7,920	15.9	404,177	5.0
Children's wear stores	67	0.1	1,997	*
Children's footwear, not including infants'/toddlers,total	32,423	100.0	1,577,685	100.0
Shoe stores	24,265	74.8	1,301,053	82.5
Department stores	3,007	9.3	157,975	10.0
Children's wear stores	442	1.4	9,294	0.6
Men's & boys' wear stores	429	1.3	5,680	0.4
Women's wear stores	53	0.2	1,281	*
Family clothing stores	4,227	13.0	102,402	6.5

* Less than 0.1%.

Source: Based on 1982 Census of Retail Trade

Shoe Stores

Details on shoe stores by size, number of firms, sales, concentration, etc.; will be found in the STATISTICAL ANALYSIS OF RETAILING FACT FILE. The following table covers a breakdown on footwear sales in shoe stores, by type of store and by footwear classification.

Shoe stores selling both men's and women's, as well as juveniles', footwear (family shoe sotres) dominate in each type of footwear.

(continued)

FOOTWEAR

Shoe Stores (continued)

Footwear Sales By Type of Shoe Store, 1982
(Includes only establishments with payroll)

	Establishments		Sales of specified merchandise line		
	Number	Percent	Amount (thous. $)	Percent	Percent by Shoe Type
Shoe stores, total	36,277	100.0	$11,275,397	100.0	—
Men's & boys' footwear, total	29,239	80.6	3,741,271	33.2	100.0
Family shoe stores	23,288	64.2	2,637,044	23.4	70.5
Men's shoe stores	4,153	11.4	1,016,967	9.0	27.2
Women's shoe stores	1,787	4.9	85,103	0.8	2.3
Children's shoe stores	11	**	2,157	**	**
Women's & girls; footwear, total	31,626	87.2	5,545,367	49.2	100.0
Family shoe stores	23,291	64.2	3,223,235	28.6	58.1
Women's shoe stores	7,832	21.6	2,303,074	20.4	41.5
Men's shoe stores	314	0.9	14,237	0.1	0.3
Children's/juveniles' shoe stores	189	0.5	4,821	0.1	0.1
Children's footwear, total*	24,265	66.9	1,301,053	11.5	100.0
Family shoe stores	21,031	58.0	1,042,918	9.2	80.2
Children's/juveniles' shoes stores	994	2.7	205,768	1.8	15.8
Women's shoe stores	1,863	5.1	44,826	0.4	3.4
Men's shoe stores	377	1.0	7,541	0.1	0.6
Related products:					
Footwear accessories	22,123	61.0	370,750	3.3	—
Other merchandise receipts	—	—	316,956	2.8	—

* Footwear for infants' and toddlers' is not included.
** Less than 0.1%.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC-82-1-3

Department Stores

Excluding leased department operations, in 1982 sales of footwear in department stores amounted to $2.7 billion. Of this total, men's and boys' footwear accounted for 29.8%; women's and girls', 63.5%; children's (not including infants'/toddlers'), 5.9%; related footwear products, 0.8%. (See the STATISTICAL ANALYSIS OF RETAILING Fact File for details on numbers of department stores, sales concentration, etc.)

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

FOOTWEAR

Department Stores (continued)

Footwear Sales in Department Stores, 1982
(Not including leased departments)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Department stores, total	9,981	100.0	$99,170,163	—	100.0
Footwear, except infants' & toddlers' total	5,290	53.0	2,685,556	3.9	2.7
Men's & boys'	4,814	48.2	801,538	1.3	0.8
Women's & girls'	5,092	51.0	1,704,678	2.5	1.7
Children's**	3,007	30.1	157,975	0.4	0.2
Related products	—	—	21,367	—	*

* Less than 0.1%.
** Not including infants'/toddlers' which are reported in children's wear.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

SPORTING GOODS & RELATED PRODUCTS

As defined by the Census Bureau, sporting goods and related products include team goods sold to teams and institutions by retail businesses as well as team goods sold at retail; also equipment for tennis, golf, skiing, camping/outdoor, hunting, trophies, plaques, bicycles, boats and other sporting goods. Activewear is not included in this broad classification, however it is covered in this section of the Fact File (as well as in the apparel sections).

As explained in the INTRODUCTION to the Fact File, in 1982, the census of retail trade treated leased departments as separate retail establishments. Because of a single large operation involving leased general-line sporting goods departments in general merchandise stores in 1982 (and no longer in operation), counts on general-line sporting goods stores have been distorted and their sales share of sporting goods products increased at the expense of general merchandise stores' share when 1982 figures are compared with 1977. (In 1977, leased department operations were included in the data for the stores in which they were operated).

Total retail sales of sporting goods and equipment, as defined by the Census Bureau, amounted to $13,038 million in 1982, representing a gain (in current dollars) of 38% compared with the 1977 total of $9,451 million.

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

SPORTING GOODS & RELATED PRODUCTS

Sporting Goods Sales By Major Type of Retail Outlet, 1982
(Includes only establishments with payroll)

	Number of Establishments	(thous. $)	Percent of Total
Sporting goods, total	70,468	$13,038,094	100.0
General merchandise group stores	14,615	2,859,631	21.9
Department stores*	5,909	1,994,501	15.3
Variety stores	4,036	215,941	1.7
Miscellaneous gen. mdse. stores	4,670	649,189	5.0
Boat/vehicle/automobile dealers	5,284	2,578,107	19.8
Sporting goods stores & bicycle shops, total**	20,152	5,624,145	43.1
General line sporting goods stores**	9,252	3,110,916	23.9
Specialty line sporting goods stores	10,900	2,513,229	19.3
Other retailers (mail order houses, hardware stores, hobby shops, etc.)	30,417	1,976,211	15.2

* Leased departments are not included. In all cases, they are treated as separate establishments in their specialty.

** See the section on Sporting Goods Stores for store definitions and a discussion regarding the leased department operations.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Sporting Goods Stores

The change in treating leased department operations as separate stores in 1982 has had a major impact on data covering general line sporting goods stores. This system has exaggerated the number of general line sporting goods stores, while diminishing the sporting goods business reported for general merchandise stores (the primary type of lessor store).

The U.S. Census Bureau has issued the following supplemental information for 1982: a total of 2,017 leased departments, re-classified as general line sporting goods stores, were operated by two firms. These operations had a combined total of $1,060.5 million in sales (24.2% of the $4,377.5 million in total sales reported for general line sporting goods stores in 1982). Through trade information, one of these operations can be identified as K-mart Sports Corp. (which leased the departments from K-mart Enterprises), operating some 1,800 departments in 1982 (but no longer operating leased departments).

The above must be kept in mind in evaluating the sales share by outlet type of sporting goods and related products in 1982 compared with the present time. Further details on the number and sales size of sporting goods stores will be found in the Fact File: A STATISTICAL ANALYSIS OF RETAILING.

Store Definitions

GENERAL LINE SPORTING GOODS STORES (SIC 5941 part): Stores primarily selling a general line of sporting goods and equipment for hunting, camping, fishing, skiing, riding, tennis, golf and other sports. Also gymnasium and other equipment.

SPECIALTY LINE SPORTING GOODS STORES (SIC 5941 part:) Stores specializing in a maximum of four lines of sporting goods and equipment, such as guns, bicycles, trophies, skiing, golfing, bowling and billiards equipment. (Bicycle shops represent a substantial portion of counts involving specialty line sporting goods stores without payroll--reported in 1977, but not in 1982).

Sporting Goods Store Sales By Merchandise Line, 1982
(Includes only establishments with payroll
as classified by the Census Bureau)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
General line sporting goods stores, total	9,252	100.0	$4,377,471	—	100.0
Sporting goods	9,252	100.0	3,110,916	71.1	71.1
Team equip. (institutions)	3,343	36.1	348,158	24.7	8.0
Team equip. (individuals)	7,834	84.7	380,467	10.5	8.7
Tennis equipment	6,983	75.5	295,585	8.4	6.8
Golf equipment	5,892	63.7	229,802	7.6	5.2
Snow/skiing equipment	1,651	17.8	193,558	12.7	4.4
Firearms/hunting equipment	6,110	66.0	385,041	12.2	8.8
Fishing tackle	2,643	28.6	177,568	8.9	4.1
Camping/backpacking equipment	5,908	63.8	358,654	11.3	8.2
Trophies, plaques	1,552	16.8	29,200	4.6	0.7
Bicycles, parts, accessories	423	4.6	28,798	10.1	0.7
Other sporting goods	7,544	81.5	684,085	18.2	15.6
Other merchandise lines:					
Activewear, exc. footwear	6,568	71.0	691,363	—	15.8
Men's & boys'	6,568	71.0	408,849	12.6	9.3
Women's & girls'	6,236	67.4	282,514	9.2	6.5
Footwear	7,164	77.4	442,247	12.7	10.1
Other merchandise, receipts	—	—	132,945	—	3.0

(continued)

SPORTING GOODS & RELATED PRODUCTS

Sporting Goods Stores (continued)

Sporting Goods Store Sales By Merchandise Line, 1982
(Includes only establishments with payroll
as classified by the Census Bureau)
(continued)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Specialty line sporting goods stores, total	10,900	100.0	3,137,440	—	100.0
Sporting goods	10,900	100.0	2,513,229	80.1	80.1
Team equip. (institutions)	615	5.6	35,083	19.8	1.1
Team equpi. (individuals)	581	5.3	38,473	21.3	1.2
Tennis equipment	1,117	10.2	76,185	18.9	2.4
Golf equipment	2,359	21.6	410,060	66.2	13.1
Snow/skiing equipment	1,775	16.3	348,836	42.9	11.1
Firearms/hunting equipment	2,143	19.7	503,486	65.7	16.0
Fishing tackle	1,959	18.0	221,370	42.3	7.1
Camping/backpacking equipment	1,273	11.7	128,287	23.1	4.1
Trophies, plaques	355	3.3	6,577	8.8	0.2
Bicycles, parts, accessories	3,605	33.1	617,546	68.7	19.7
Other sporting goods	1,994	18.3	127,326	17.9	4.1
Other merchandise lines:					
Activewear, exc. footwear	2,493	22.9	245,786	—	7.8
Men's & boys'	2,493	22.9	134,848	15.9	4.3
Women's & girls'	2,177	20.0	110,938	15.0	3.5
Footwear	2,089	19.2	76,096	10.5	2.4
Other merchandise, receipts	—	—	302,329	—	9.6

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade, RC82-1-3

Department Stores, Boat Dealers, etc.

For information on number of stores and of firms, by sales size, employment, etc. see the Fact File: A STATISTICAL ANALYSIS OF RETAILING. Following is information on sales of specified merchandise lines within the sporting goods and related product category. Again, as noted on page 25, leased departments are not included in the departmental data, but in 1982 were counted as separate retail outlets, in the appropriate retail specialty.

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

SPORTING GOODS & RELATED PRODUCTS

Department Stores, Boat Dealers, etc. (continued)

Sporting Goods & Related Product Sales In Specified Store Types, 1982
(Includes only establishments with payroll

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Department stores, total	9,981	100.0	$99,170,163	—	100.0
Sporting goods, total	5,909	59.2	1,994,501	3.1	2.0
Bicycles, parts, accessories	5,219	52.3	585,637	1.1	0.6
Other sporting goods	5,181	51.9	1,498,864	2.4	1.4
Adult active sportswear, total excluding footwear	na	—	2,008,564	—	2.0
Men's	6,931	—	796,943	1.0	0.8
Women's	6,175	—	1,578,107	1.6	1.2
Boat, recreational vehicle; motorcyle, etc., dealers	11,740	100.0	9,038,829	—	100.0
Sporting goods	5,284	45.0	2,578,107	71.6	28.5

na - not available

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

Activewear

Among the major store types for which sales of activewear were reported in the 1982 census, sales amounted to over $4.9 billion. Of this total, activewear for men amounted to $1.8 billion and for women, to over $3.0 billion. Sales by major outlet type were reported as follows:

Adult Activewear Sales By Type of Retail Outlet, 1982
(Sales in thousands of dollars)

	Total Reported		Men's		Women's	
	Sales	Percent	Sales	Percent	Sales	Percent
Adult activewear, reported total*	$4,846,772	100.0	$1,831,869	100.0	$3,014,903	100.0
Department stores	2,008,564	41.4	796,943	43.5	1,211,621	40.2
Apparel specialty stores:	1,901,059	39.2	491,229	26.8	1,409,827	46.7
Men's wear stores	186,023	3.8	174,505	9.5	11,518	0.4
Women's ready-to-wear stores	916,450	18.9	29,546	1.6	886,904	29.4
Women's accessory/specialty stores	164,765	3.4	—	—	164,765	5.5
Family clothing stores	631,615	13.0	287,178	15.7	344,437	11.4
Children's wear stores	2,206	**	—	—	2,206	**
Sporting goods stores, total	937,149	19.4	543,697#	29.7	393,452##	13.1
General line	691,363	14.3	408,849	22.3	282,514	9.4
Specialty line	245,786	5.1	134,848	7.4	110,938	3.7

* Not including footwear
** Less than 0.1%
# Includes men's and boys' active wear
## Includes women's and girls' activewear

Source: Based on 1982 Census of Retail Trade

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

MISCELLANEOUS PRODUCTS (TOYS, GAMES, PHOTO EQUIPMENT, STATIONERY, BOOKS)

Major Reporting Outlet Types (Establishments with payroll)

Number of Establishments Selling Each Category & Sales of Category
(in millions of dollars)

Reporting Retailers	Toys		Hobby & Craft Goods, Games		Photo Equipment		Luggage & Leather Goods	
(major types)	Estabs.	Mil. $	Estabs.	Mil. $	Estabs.	Mil. $	Estabs.	Mil. $
Total	50,046	$5,407.2	29,729	$2,411.0	37,630	$2,482.1	18,520	$1,190.9
Department stores	8,538	2,209.1	5,916	694.9	7,241	1,243.2	4,438	376.4
Variety stores	10,244	506.3	5,515	94.6	5,783	97.8	3,942	44.6
Other general mdse. stores	7,609	534.3	2,470	147.5	3,141	358.1	4,282	151.6
Hobby, toy, game stores	4,321	1,503.8	6,188	1,033.1	283	12.3	—	—
Luggage, leather goods	112	0.4	579	9.8	14	0.6	1,883	509.2
Gift, novelty shops	3,178	83.4	1,876	61.1	597	17.6	1,244	27.0
Drug stores	12,897	347.9	4,318	82.9	17,708	478.0	—	—
Mail order houses*	3,027	155.8	2,841	257.4	2,812	251.5	2,703	78.7
Direct selling estabs.	120	66.2	26	29.7	51	23.0	28	3.0

	Books, Magazines Newspapers		Stationery & School Supplies		Greeting Cards	
	Estabs.	Mil.$	Estabs.	Mil. $	Estabs.	Mil. $
Total	114,408	$6,912.3	61,078	$3,566.4	60,414	$2,565.8
Department stores	6,385	471.5	8,514	1,020.8	7,835	513.9
Variety stores	5,503	67.4	10,426	517.2	7,357	133.3
Other general mdse. stores	2,499	38.6	5,633	109.1	3,045	43.8
Grocery stores	59,904	1,606.2	—	—	—	—
Drug stores	23,094	507.8	21,698	420.6	27,448	668.4
Book stores	9,355	2,616.9	2,087	139.7	—	—
Stationery stores	1,125	47.9	4,750	1,037.4	2,133	96.0
Gift, novelty stores	3,869	74.3	5,486	98.7	11,982	1,063.9
Mail order houses*	1,722	835.7	2,232	143.5	581	43.8
Direct selling estabs.	952	651.0	252	79.4	33	2.7

* Catalog order desks operated in department stores, or other store types, are included in data on stores in which they are operated.

Source: Based on 1982 Census of Retail Trade.

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

HOMEFURNISHINGS & EQUIPMENT

The total market for homefurnishings and equipment, as measured in 1982 census of retail trade reports covering retail outlets with payroll, amounted to $84.4 billion in that year, according to the U.S. Bureau of the Census. In terms of major product categories, the retail sales pie was divided as noted below.

Homefurnishings & Equipment Sales Through Retail Outlets, 1982
(Includes only establishments with payroll)

	Establishments	Sales Thous. $	Sales Percent
Homefurnishings & equipment, total	--	$84,399,182	100.0
Furniture & bedding (sleep equipment)	67,720	19,086,032	22.6
Major appliances (kitchen/laundry appliances, room air conditioners, vacuum cleaners, sewing machines)	61,383	11,336,558	13.4
Small electric appliances (including household & personal care)	69,910	4,380,812	5.2
Kitchenware & homefurnishings (housewares, tabletop, giftwares, decorative accessories, lamps, mirrors, etc.)	150,023	15,642,082	18.5
TV & video recorders & tapes	58,735	6,841,209	8.1
Audio equipment & musical instruments & supplies	74,084	11,278,674	13.4
Curtains, draperies, other home textiles (domestics), venetian blinds & other window coverings	63,350	8,926,133	10.6
Floor coverings (soft & hard)	56,540	6,907,682	8.2

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

FURNITURE & BEDDING

Stores classified as "furniture stores" are the major outlet for furniture and bedding, accounting for 73.9% of the $19.1 billion in reported sales through retail outlets with payroll in 1982. In the previous census of retail trade, covering 1977, furniture and bedding sales totaled $14.7 billion and furniture stores accounted for 73.5% of the total. Department stores accounted for 16.2% of reported sales in 1982; 17.7% in 1977. (Dollar sales are in current dollars, without adjustment for inflation.)

HOMEFURNISHINGS & EQUIPMENT

FURNITURE & BEDDING (continued)

Furniture & Bedding Sales by Major Retail Outlet Type, 1982

(Includes only establishments with payroll)

	Number of Establishments	Sales by Outlet Type (thous. $)	Sales by Outlet Type % of Total
Furniture & bedding total	67,720	$19,086,032	100.0
General merchandise group stores*	15,695	3,440,727	18.0
Department stores*	8,162	3,099,952	16.2
Furniture, homefurnishings store group	34,031	14,577,834	76.4
Furniture stores	29,609	14,095,074	73.9
Nonstore retailers:			
Mail order houses**	3,142	257,208	1.3
Other retailers	14,852	810,263	4.3

* Leased departments are not included. (See introduction to this Fact File).

** Catalog order desks are included in the sales of the stores in which operated.

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade RC82-1-3

Furniture Stores, Department Stores

Details on stores, covering number of firms, sales size, employment, etc., will be found in the STATISTICAL ANALYSIS OF RETAILING Fact File. Following is information on furniture and on the other major merchandise classifications sold in furniture stores and in department stores.

Furniture Store Sales By Major Merchandise Lines, 1982

(Includes only establishments with payroll)

			Sales of specified merchandise line		
				Percent of total sales of	
	Establishments		Amount	Estabs. selling	All
	Number	Percent	(thous. $)	the line	Estabs.
Furniture stores, total	29,609	100.0	$17,223,362	—	100.0
Furniture & bedding	29,609	100.0	14,095,074	81.8	81.8
Curtains, draperies, dry goods	8,791	29.7	238,675	4.2	1.4
Major household appliances	10,270	34.7	831,539	12.7	4.8
Small electric appliances	494	1.7	16,271	2.6	0.1
TV's, video recorders, tapes	8,877	30.0	376,171	6.5	2.2
Audio equip., musical instruments	1,716	5.8	65,088	4.0	0.4
Floor coverings	11,917	40.2	621,292	7.9	3.6
Kitchenware, homefurnishings	15,171	51.2	691,292	6.6	4.0
Other merchandise, receipts	—	—	287,418	—	1.7

(continued)

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

HOMEFURNISHINGS & EQUIPMENT

Furniture Stores, Department Stores (continued)

Furniture Stores Sales By Major Merchandise Lines, 1982

(Includes only establishments with payroll)
(continued)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Department stores, total	9,981	100.0	$99,170,163	—	100.0
Furniture & bedding	8,162	81.8	3,099,952	3.6	3.1
Upholstered furniture	3,367	33.7	726,878	1.4	0.7
Other living room, dining room, bedroom furniture	3,798	38.0	785,545	1.5	0.8
Sleep furniture (mattresses, spring, dual-purpose, etc.)	3,725	37.3	804,595	1.5	0.8
All other furniture	6,954	69.7	782,934	1.1	0.8
Floor coverings	6,394	64.1	795,419	1.2	0.8
Kitchenware, homefurnishings	9,759	97.8	5,378,647	5.5	5.4
Cookware, cooking accessories	9,200	92.2	1,500,291	1.6	1.5
Dinnerware, tabletop, giftwares	8,750	87.7	1,465,680	1.6	1.5
Decorative accessories	8,962	89.8	1,187,248	1.3	1.2
Other homefurnishings	7,793	78.1	1,225,428	1.6	1.2

MAJOR APPLIANCES

Major Household Appliances Sales By Major Retail Outlet Type, 1982

(Includes only establishments with payroll)

	Number of Establishments	Sales by Outlet Type	
		(thous. $)	% of Total
Major appliances, total	61,383	$11,336,558	100.0
Household appliance stores	10,239	3,625,163	32.0
Department stores*	6,286	3,585,980	31.6
Radio/TV stores	2,691	694,021	5.6
Building materials, hardware, garden supply, mobile home dealers	9,008	479,756	4.2
Nonstore retailers	5,270	1,086,808	9.6
Mail order houses**	3,318	510,137	4.5
Direct selling establishments	1,952	576,671	5.1
Other retailers	27,889	1,924,830	17.0

* Leased departments are not included in data on the stores in which they are operated. They are counted as separate establishments in the appropriate kind of business specialty store classification. Sales from catalog order desks are included in department store data.

**See above footnote (*) regarding catalog order desks.

Note: Retail sales do not include major appliances which reach consumers through builders or other-than-retail outlets.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

HOMEFURNISHINGS & EQUIPMENT

Household Appliance Stores

For information on number of stores by sales size, number of firms, etc., see the STATISTICAL ANALYSIS OF RETAILING Fact File.

Household Appliances Store Sales By Major Merchandise Line, 1982
(Includes only establishments with payroll)
(continued)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Household appliance stores, total	10,542	100.0	$5,697,300	—	100.0
Major household appliances	10,239	97.1	3,625,163	64.7	63.6
Kitchen appliances	8,198	77.8	2,019,581	39.5	35.4
Laundry appliances	6,969	66.1	886,145	20.0	15.6
Other major appliances	7,631	72.4	719,437	16.9	12.6
Small electric appliances	1,758	16.7	141,502	10.9	2.5
TV's, video recorders, tapes	5,287	50.1	835,451	21.5	14.7
Audio equipment & accessories	2,597	24.6	131,101	5.8	2.3
Records & tapes	491	4.6	7,530	1.3	0.1
Furniture & sleep equipment	1,548	14.7	231,684	20.3	4.1
Floor coverings	651	6.2	31,576	6.5	0.6
Kitchenware & homefurnishings	1,144	10.8	35,030	3.6	0.6
Sporting goods	247	2.3	6,108	2.5	0.1
Hardware, tools, plumbing, supplies	889	8.4	63,238	9.6	1.1
Calculating equipment, computers	306	2.9	15,649	3.3	0.3
Other merchandise, receipts	—	—	573,268	—	10.1

Source: U.S. Bureau of the Census,
Census of Retail Trade, RC82-1-3

Department Stores

Department Store Sales of Major Appliances, 1982

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Department stores, total	9,981	100.0	$99,170,163	—	100.0
Major household appliances	6,286	63.0	3,585,980	5.2	3.6
Kitchen appliances	3,149	31.5	1,731,468	3.8	1.7
Laundry appliances	2,145	21.5	798,540	2.2	0.8
Other major appliances	5,482	54.9	1,055,972	1.7	1.1

Note: For details on sales of appliance in furniture stores, see the section on Furniture.

Source: U.S. Bureau of the Census,
Census of Retail Trade, RC82-1-3

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

HOMEFURNISHINGS & EQUIPMENT

Housewares (Electric & Nonelectric) (Kitchenware & Related Products)

Sales of kitchenware and homefurnishings (as defined in the first table in this section on Homefurnishings and Equipment) amounted to $15.6 billion compared with a total of $9.9 billion in 1977. Sales of small electric appliances were reported at $4.4 billion in 1982 vs. $2.8 billion in 1977. It should be kept in mind that these are current dollars, and inflation in this period is a factor in the sales increase.

Sales by major type of outlet in 1982 were distributed as noted below.

Kitchenware/Homefurnishings & Small Electric Appliance Sales
By Major Retail Outlet Type, 1982
(Includes only establishments with payroll)

	Number of Establishments	Sales By Outlet Type	
		(thous. $)	% of Total
Kitchenware/homefurnishings, total	150,023	$15,642,082	100.0
General merchandise stores, total	30,553	7,107,992	45.4
Department stores*	9,759	5,378,647	34.4
Variety stores	10,387	655,260	4.2
Misc. general mdse. stores	10,407	1,074,085	6.9
Furniture, homefurnishings, equipment stores, total	31,269	2,547,976	16.3
Furniture stores	15,171	691,292	4.4
Drapery, curtain, uphol. stores	478	19,475	0.1
Kitchenware & homefurnishings stores	7,767	1,762,673	11.3
Appliance, radio, TV, music stores	7,548	66,944	0.4
Building materials, hardware, garden supply, mobile home dealers, total	14,751	863,731	5.5
Hardware stores	11,439	434,429	2.8
Grocery stores/supermarkets	17,638	1,292,552	8.3
Drug & proprietary stores	13,677	592,653	3.8
Jewelry stores	7,920	388,427	2.5
Gift, novelty, souvenir shops	13,472	1,308,379	8.4
Nonstore retailers:			
Mail order houses	3,507	735,266	4.7
Direct selling establishments	893	321,847	2.1
Other retailers	16,343	483,259	3.0
Small electric appliances, total	69,910	4,380,812	100.0
General merchandise stores, total	23,199	2,845,932	65.0
Department stores	8,891	2,115,475	48.3
Variety stores	8,383	156,365	3.6
Misc. general mdse. stores	5,925	574,092	13.1
Household appliance stores	1,758	141,502	3.2
Other homefurnishings stores, incl. furniture, radio, TV stores	1,625	69,404	1.6
Hardware stores	9,286	184,128	4.2
Grocery stores, supermarkets	3,995	201,735	4.6
Drug & proprietary stores	15,071	568,230	13.0
Nonstore retailers:			
Mail order houses	3,098	153,560	3.5
Direct selling establishments	259	17,150	0.4
Other retailers	11,619	199,171	4.5

* Includes sales from catalog order desks but excludes all leased department activity.

Source: U.S. Bureau of the Census,
Census of Retail Trade RC82-1-3

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAI[illegible]USINESS

HOMEFURNISHINGS & EQUIPMENT

Housewares (Electric & Nonelectric) (Kitchenware & Related Products)(continued)

In the 7,676 "Kitchenware and Homefurnishings Stores", this merchandise represented 76.1% of the stores' total sales and amounted to $1,763 million in 1982.

Information on merchandise line sales in department stores, furniture stores and household appliance stores will be found on preceding pages. See Grocery and Drug Store merchandise breakouts in appropriate sections of this Fact File. Details on stores in terms of number by sales size, number of firms, etc., are covered in the Fact File: A STATISTICAL ANALYSIS OF RETAILING.

TV & VIDEO RECORDERS, TAPES, AUDIO EQUIPMENT, MUSICAL INSTRUMENTS & SUPPLIES

Retail Sales By Major Retail Outlet Type, 1982

(Includes only establishments with payroll)

	Number of Establishments	Sales By Outlet Type (thous. $)	% of Total
TV, video recorders, tapes, total	58,735	$6,841,209	100.0
Furniture, homefurnishings & equipment stores, total	29,594	4,039,291	59.0
Radio, TV stores	14,240	2,767,420	40.5
Household appliance stores	5,287	139,410	12.2
General merchandise group stores	10,769	2,193,966	32.1
Department stores*	5,164	1,833,943	26.8
Nonstore retailers:			
Mail order houses	3,206	175,011	2.6
Other retailers	15,166	432,941	6.3
Audio equipment, Musical Instruments & Supplies, total	74,084	11,278,674	100.0
Furniture, homefurnishings & equipment stores, total	28,277	7,410,730	65.7
Radio, TV stores	14,482	3,685,411	32.7
Music stores	9,284	3,512,645	31.1
General merchandise group stores, total	19,259	2,515,266	22.3
Department stores*	8,466	1,717,214	15.2
Nonstore retailers:			
Mail order houses	3,489	666,610	5.9
Direct selling establishments	272	36,088	0.3
Other retailers	22,787	649,980	5.8

* Includes sales from catalog order desks but excludes all leased department activity.

Source: U.S. Bureau of the Census,
Census of Retail Trade RC82-1-3

Information on some of the leading outlets listed above (department stores, household appliance stores, etc.,) has been covered in previous tables in this section covering merchandise line sales. Also see store data in the Fact File referred to above.

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

TV & VIDEO RECORDERS, TAPES, AUDIO EQUIPMENT, MUSICAL INSTRUMENTS & SUPPLIES

Radio & Television Store Sales By Major Merchandise Line, 1982
(Covers only establishments with payroll)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Radio & television stores, total	19,462	100.0	$9,764,228	—	100.0
TV's, video recorders and tapes	14,420	73.2	2,767,424	38.1	28.3
Audio equipment, musical instruments and supplies	14,482	74.4	3,685,411	49.7	37.7
Major appliances	2,691	13.8	634,021	24.3	6.5
Kitchen appliances	2,357	12.1	39[illegible],652	16.3	4.0
Laundry appliances	1,647	8.5	151,287	8.4	1.5
Other major appliances	1,380	7.1	90,082	5.4	0.9
Small electric appliances	333	1.7	22,834	5.4	0.2
Furniture & sleep equipment	394	2.0	62,148	12.9	0.6
Kitchenware and home furnishings	6,363	32.7	30,624	1.5	0.3
Calculating equipment & computers	10,060	51.7	1,553,955	35.3	15.9
Other merchandise, service receipts	—	—	1,007,811	—	10.5
Music stores, total	9,284	100.0	3,781,012	—	100.0
TV's, video recroders and tapes	1,047	11.3	55,403	12.0	1.5
Audio equipment, musical instruments and supplies	9,284	100.0	3,512,645	92.9	92.9
Other merchandise, receipts	—	—	212,964	—	5.6
Record shops, total	4,420	100.0	1,903,625	—	100.0
Audio equipment, musical instruments and supplies	4,420	100.0	1,774,921	93.2	93.2
Audio equipment and accessories	1,226	27.7	95,864	16.0	5.0
Records and tapes	4,420	100.0	1,639,834	86.1	86.1
Other merchandise, service receipts, etc.	—	—	128,704	—	6.8

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

CURTAINS, DRAPERIES, DOMESTICS, WINDOW COVERINGS, FLOOR COVERINGS

Retail sales through outlets with payroll of curtains, draperies, shades, venetian blindes, linens and domestics amounted to $8,926 million, in 65.350 outlets in 1982. (Fabrics, custom-made products, shades and blinds are included). Due to a change in product classification, comparable figures for 1977 are not available.

Sales of hard and soft surface floor covering in 1982 were reported at $6,908 million in 56,540 outlets with payroll. Floor coverings sales in 65,697 retail outlets with payroll amounted to $5,770 million in 1977.

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

CURTAINS, DRAPERIES, DOMESTICS, WINDOW COVERINGS, FLOOR COVERINGS

Curtain, Drapery, Domestics, Window Coverings, Floor Coverings Sales By Major Retail Outlet Type, 1982

(Includes only establishments with payroll)

	Number of Establishments	Sales By Outlet Type (thous. $)	Sales By Outlet Type % of Total
Curtains, draperies, domestics, window coverings, etc.	65,350	$8,926,133	100.0
General merchandise group stores	27,560	5,760,222	64.5
Department stores*	9,721	4,972,164	55.7
Variety stores	9,986	477,871	5.4
Misc. general merchandise stores	7,853	310,187	3.5
Furniture, homefurnishings stores, total	18,537	1,870,116	21.0
Furniture stores	8,791	238,675	2.7
Drapery, curtain, upholstery stores	4,063	723,066	8.1
Misc. homefurnishings stores	3,524	812,964	9.1
Nonstore retailers:			
Mail order houses	3,265	556,300	6.2
Direct selling establishments	966	120,270	1.3
Other retailers	15,022	619,225	6.9
Floor coverings, total	56,540	6,907,682	100.0
Furniture, homefurnishings stores, total	25,264	5,145,456	74.5
Furniture stores	11,917	621,778	9.0
Floor covering stores	11,125	4,430,570	64.1
Other homefurnishings stores	2,222	93,108	1.4
General merchandise group stores	12,894	889,091	12.9
Department stores*	6,394	795,419	11.5
Other general merchandise stores	6,500	93,672	1.4
Building materials, hardware, garden supply, mobile home dealers	11,475	674,791	9.8
Nonstore retailers	3,339	145,664	2.1
Other retailers	3,568	52,680	0.7

* Includes sales from catalog order desks but excludes all leased department activity. In all cases, leased departments are counted as separate establishments in their specific merchandise specialty.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

RETAIL TRADE: SELECTED MERCHANDISE LINES BY TYPE OF RETAIL BUSINESS

CURTAINS, DRAPERIES, DOMESTICS, WINDOW COVERINGS, FLOOR COVERINGS

Drapery, Curtain, Upholstery Store & Floor Covering Store Sales By Major Merchandise Line, 1982

(Includes only establishments with payroll)

	Establishments		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Estabs. selling the line	All Estabs.
Drapery, curtain, upholstery stores, total	4,063	100.0	$ 858,084	—	100.0
Curtains, draperies, dry goods	4,063	100.0	723,066	84.3	84.3
Window & furniture coverings	4,063	100.0	689,700	80.4	80.4
Domestics	643	15.8	33,310	20.8	3.9
Floor coverings	702	17.3	30,951	18.7	3.6
Other merchandise & receipts	—	—	104,067	—	12.1
Floor covering stores, total	11,125	100.0	5,015,493	—	100.0
Floor coverings	11,125	100.0	4,430,570	88.3	88.3
Soft-surface floor coverings	9,851	88.5	3,253,210	71.3	64.9
Hard-surface floor coverings	8,824	79.3	1,777,360	30.2	23.5
Other merchandise & receipts, including installation, repair	—	—	584,923	—	11.7

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade RC82-1-3

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification , the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now--1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchanising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumber buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S.mills, as well as exports and imports, end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change. For orders and further information, please write to:

FAIRCHILD FACT FILES,
Fairchild Books,
7 East 12th Street, New York, N.Y. 10003

Titles with months in parentheses will be published in the months listed.

C 3400-1.85-4

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

Household Furniture and Bedding

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst
Kenneth Greenman, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

TABLE OF CONTENTS

Page

MARKET TRENDS.......... 1
AT THE MANUFACTURING LEVEL.......... 2
  GENERAL INDUSTRY STATISTICS.......... 2
    EMPLOYMENT & EARNINGS.......... 7
    CONCENTRATION IN THE INDUSTRY.......... 8
    OPERATING RATIOS..........11
  PRODUCTION..........16
  SHIPMENTS..........16
  PRODUCER PRICES..........31
  FOREIGN TRADE..........32
AT THE RETAIL LEVEL:
  THE POTENTIAL MARKET..........33
  CONSUMER EXPENDITURES..........35
  RETAIL SALES BY STORE TYPE..........39
    FURNITURE STORES..........40
    DEPARTMENT STORES..........44
  CONSUMER PRICE INDEX..........47
  RETAIL ADVERTISING..........47
  CONSUMER BUYING HABITS..........48

SCHEDULE OF ADDITIONAL FACT FILES..........51

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add up to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1986 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-549-6

Printed in the United States of America

HOUSEHOLD FURNITURE & BEDDING

Market Trends

The recovery of the $25 billion-plus (at retail) U.S. furniture and bedding market, which began in 1983, has generally continued despite a weak performance in the first half of the year. However, retailers reporting in early 1986 find furniture business spotty, with modular, occasional and knock-down furniture pieces doing best.

The American Furniture Manufacturers Association looks for sales of furniture to reach about $24.4 billion in 1986, up from $23.2 billion in 1985. Favorable factors are the generally stronger economy and particularly the easing of mortgage rates which have spurred sales of new housing as well as housing resales. Lower energy costs and the strong equity markets have also encouraged home buyers, who will, in turn, need new furniture.

Other factors slow the demand for new furniture. The build-up in consumer installment and other debts, for one. Industry sources indicate that approximately 60% of all furniture sales are financed on credit. Consumer installment debt as a percentage of personal income reached an all-time high in 1985, exceeding 15%. Personal savings rates, meanwhile, were at an all-time low, falling below 5%. Another factor in decreased demand for furniture--particularly for larger pieces or suites--is the continued trend toward smaller, affordable housing. Between 1980 and 1985, the percentage of new housing units with two bedrooms or less increased from 17% to 25%.

Domestic manufacturers, on the other hand, are faced with problems of rising costs and competition from imports, which increases each year. The case goods and occasional furniture segments are particularly vulnerable to pressure from imports, and these are expected to grow from 14% of total U.S. consumer market in 1985 to 15% in 1986, and to 18 or 20% by 1990. In the upholstered furniture segment, price increases in two major components--foam and fabric--are being faced by manufacturers.

Because of the competition from imports, major U.S. retailers are now buying directly from overseas manufacturers, and several U.S. furniture makers are sourcing off-shore on a selective basis. This allows them to compete in lower-priced lines under their own brand names.

High transportation costs have kept the size of the U.S. export market fairly small, as well as different style preferences. The lower value of the U.S. dollar in relation to many foreign currencies may lead to some gains in 1986.

A view of the longer-range prospects for the U.S. furniture market must take into consideration all of the above plus changing life-styles and demographics in the U.S. market. Furniture's share of total consumer expenditures has declined sharply in the 1960's. It accounted for 12% of total spending for durable goods; the share is now down to about 7%.

An increasing number of households are composed of young couples and of persons living alone in apartments, town houses, or condominiums. Where there are children, there is usually only one. The result is a smaller demand for furniture. Furniture designed to house home-entertainment systems is among the fastest-growing categories, but it accounts for only a small share of total furniture shipments.

Market Trends
(continued)

Furniture makers are designing smaller pieces to fit smaller spaces and casual life styles, and turning to newer looks, usually wicker and rattan. Recliner and modular manufacturers are expecting to get impetus in sales from the new motorized categories.

There were approximately 15 million bedding units sold in 1985, an increase of 13% from the 13.3 million units reported in 1983 and a six-fold increase since 1975. Waterbeds currently account for about 20% of the bedding market, or about 3 million units.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

Industry Shipments

An analysis of trends in the furniture and bedding industry is included in the annual report, U.S. Industrial Outlook, compiled by the International Trade Administration, U.S. Department of Commerce. Included are the major segments of the industry: manufacturers classified in the wood and in the upholstered furniture segments, in metal household furniture and in bedding (mattresses and springs).

Trends in Specified Segments of the Household Furniture Industry & In the Bedding Industry, 1977-1982
(Compound annual rate of growth)

Industry data	Wood Household Furniture 1977-1982	Upholstered Household Furniture 1977-1982	Metal Household Furniture 1977-1982	Mattresses and Bedsprings 1977-1982
Value of shipments (current $)	+ 4.0%	+ 3.6%	+ 4.0%	+ 6.7%
Value of shipments (1982 $)	- 3.9	- 2.1	- 1.9	- 0.4
Total employment	- 2.3	- 4.5	- 4.0	- 1.2
Production workers	- 2.6	- 4.6	- 4.7	- 1.6
Average hourly earnings	+ 8.2	+ 7.3	+ 7.3	+ 6.6
Capital expenditures	+ 3.2	+ 2.6	+ 2.2	+11.5

Source: U.S. Department of Commerce, International Trade Administration, 1986 Industrial Outlook.

The ITA estimated industry shipments (which include all products--both primary and secondary--made by manufacturers in the specified industry classification, plus miscellaneous receipts & contract work) at $16.9 billion in 1985, an increase of 5.9% over 1984. In terms of a constant dollar, eliminating the effects of inflation, furniture and bedding industry shipments were up 2.5% in 1985 over 1984, and a 2.0% gain is forecast by the ITA for 1986.

GENERAL INDUSTRY STATISTICS

Industry Shipments

Estimated Value of Furniture Industry Shipments, 1984, 1985
(Millions of dollars)

	Current Dollars		Constant (1982) Dollars		% Change 1985/1984	
	1985	1984	1985	1984	Current Dollars	Constant Dollars
Value of shipments, total	$16,908	$15,967	$15,487	$15,105	+ 5.9%	+ 2.5%
Wood household furniture	6,831	6,497	6,021	5,932	+ 5.1	+ 1.5
Upholstered household furniture	4,962	4,610	4,563	4,388	+ 7.6	+ 4.0
Metal household furniture	1,900	1,821	1,850	1,804	+ 4.3	+ 2.5
Mattresses & bedsprings	2,297	2,169	2,219	2,165	+ 5.9	+ 2.5

Value of Shipments Forecast: 1986/1985 (In Constant Dollars)

	% Change 1986/1985
Value of shipments, total	+ 2.1%
Wood household furniture	+ 1.5
Upholstered household furniture	+ 2.5
Metal household furniture	+ 1.5
Mattresses & bedsprings	+ 3.0

Note: The total value of shipments includes household furniture not elsewhere classified.

Source: U.S. Department of Commerce, International Trade Administration
1986 U.S. Industrial Outlook

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census. Results from the latest census, covering the year 1982, are summarized below. During intercensal years, the Bureau conducts annual surveys using a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity.

According to the 1983 annual survey, the value of industry shipments of every measured category of furniture and bedding (including primary products and secondary as well as miscellaneous receipts) rose between 1982 and 1983, with increases ranging from 1.2 to 21.2%.

GENERAL INDUSTRY STATISTICS

Profile of the U.S. Furniture & Bedding Manufacturing Industry
1977, 1982, 1983

Wood Household Furniture (SIC 2511*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	2,430	2,796	na
Number of establishments, total**	2,503	2,607	2,982	- 4.0%
Number with 20 or more employees	804	833	815	- 3.5
Employees, total (thous.)	125.7	125.6	140.8	+ 0.1
Production workers (thous.)	109.7	109.2	124.6	+ 0.5
Payroll (mil. $) (production workers)	$1,532.0	$1,402.7	$1,137.3	+ 9.3
Value added by manufacture# (mil. $)	3,088.5	2,715.0	2,235.0	+13.8
Value of industry shipments## (mil. $)	5,702.4	5,056.6	4,140.3	+12.8
Capital expenditures, new (mil. $)	111.5	119.1	101.6	- 6.4

Upholstered Household Furniture (SIC 2512*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	1,129	1,357	na
Number of establishments, total**	1,169	1,227	1,473	- 4.7%
Number with 20 or more employees	602	602	730	--
Employees, total (thous.)	72.5	70.6	89.1	+ 2.7
Production workers (thous.)	62.6	59.8	75.7	+ 4.7
Payroll (mil. $) (production workers)	$ 994.3	$ 849.9	$ 779.2	+17.0
Value added by manufacture# (mil. $)	1,990.8	1,745.3	1,437.3	+14.1
Value of industry shipments## (mil. $)	3,989.7	3,505.3	2,931.0	+13.8
Capital expenditures, new (mil. $)	61.5	57.2	50.4	+ 7.5

Metal Household Furniture (SIC 2514*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	413	405	na
Number of establishments, total**	436	454	448	- 4.0%
Number with 20 or more employees	209	205	213	+ 2.0
Employees, total (thous.)	28.3	27.0	33.2	+ 4.8
Production workers (thous.)	23.0	21.5	27.4	+ 7.0
Payroll (mil. $) (production workers)	$ 391.2	$ 362.4	$ 302.2	+ 7.9
Value added by manufacture# (mil. $)	836.4	807.0	637.4	+ 3.6
Value of industry shipments## (mil. $)	1,701.0	1,590.7	1,307.1	+ 6.9
Capital expenditures, new (mil. $)	23.1	25.4	22.8	- 9.1

(continued)

GENERAL INDUSTRY STATISTICS

Profile of the U.S. Furniture & Bedding Manufacturing Industry
1977, 1982, 1983
(continued)

Mattresses & Bedsprings (SIC 2515*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	786	832	na
Number of establishments, total**	898	902	962	- 0.4%
Number with 20 or more employees	355	336	355	+ 5.7
Employees, total (thous.)	25.6	25.4	27.0	+ 0.8
Production workers (thous.)	19.2	19.0	20.6	+ 1.1
Payroll (mil. $) (production workers)	$ 387.2	$ 357.4	$ 279.8	+ 8.3
Value added by manufacture# (mil. $)	907.3	882.4	616.6	+ 2.8
Value of industry shipments## (mil. $)	2,026.1	1,935.4	1,398.5	+ 4.7
Capital expenditures, new (mil. $)	34.7	25.0	14.5	+38.8

Wood TV & Radio Cabinets (SIC 2517*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	82	91	na
Number of establishments, total**	75	83	94	- 9.6%
Number with 20 or more employees	32	37	51	-13.5
Employees, total (thous.)	6.2	7.0	10.7	-11.4
Production workers (thous.)	5.4	5.9	9.3	- 8.5
Payroll (mil. $) (production workers)	$ 83.1	$ 88.6	$ 89.0	- 6.2
Value added by manufacture# (mil. $)	155.5	152.1	150.4	+ 2.2
Value of industry shipments## (mil. $)	310.3	306.6	304.8	+ 1.2
Capital expenditures, new (mil. $)	6.3	7.3	11.1	-13.7

Household Furniture Not Elsewhere Classified (SIC 2519*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	196	198	na
Number of establishments, total**	189	202	201	- 6.4%
Number with 20 or more employees	60	63	59	- 4.8
Employees, total (thous.)	7.7	7.4	8.7	+ 4.1
Production workers (thous.)	6.5	6.0	7.5	+ 8.3
Payroll (mil. $) (production workers)	$ 114.7	$ 100.7	$ 79.7	+13.9
Value added by manufacture# (mil. $)	219.1	153.3	131.0	+42.9
Value of industry shipments## (mil. $)	462.0	381.1	301.9	+21.2
Capital expenditures, new (mil. $)	12.4	11.9	10.4	+ 4.2

na not available

(see footnotes on next page)

GENERAL INDUSTRY STATISTICS

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2511 comprises establishments primarily engaged in manufacturing wood household furniture used in dwellings, not including upholstered pieces, but including infants' and children's wood furniture and wood outdoor furniture.

SIC 2512 comprises establishments primarily manufacturing upholstered furniture on wood frames.

SIC 2514 covers establishments primarily engaged in manufacturing metal household furniture, padded or plain, but not dual-purpose sleep furniture.

SIC 2515 comprises manufacturers of mattresses (innerspring, box, etc.) and dual-purpose sleep furniture (studio couches, sofa beds, chair beds). This industry is referred to as the "Bedding Industry" in this Fact File.

SIC 2517 comprises manufacturers of wood TV, radio, phonograph and sewing machine cabinets.

SIC 2519 comprises establishments primarily manufacturing reed, rattan, and other wicker furniture, plastic and fiberglass household furniture and cabinets, and household furniture not elsewhere classified.

** An establishment covers a plant with one or more employees. It is a single physical location where manufacturing is performed and is classified on the basis of its major product in the specific year covered--which might change from one year to another.

Value added by manufacture is derived by subtracting the cost of finished products, materials, supplies, fuel, contract work, etc., from the value of shipments (including resales of finished products) plus the net change in the value of finished products and work-in-process inventories between the beginning and end of the year, without adjustment for price changes.

Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes, and includes both products described as primary to the industry as well as secondary products and miscellaneous receipts. This value should be clearly distinguished from the total value of furniture and bedding manufactured by all producers, including those classified in other industries. This total product value is shown in the section on PRODUCT SHIPMENTS.

Source: U.S. Bureau of the Census:
1982 Census of Manufactures, MC82-I-25A;
Annual Survey of Manufactures, 1983;
County Business Patterns, 1983.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

According to the Bureau of Labor Statistics, U.S. Labor Department, every measured category of household furniture recorded an increase in its employment level between 1982 and 1983. However, the Bureau reports that between 1983 and 1984, only the wood household furniture and upholstered household furniture registered increases in overall employment. Production worker employment has risen each year from 1982 and 1984.

As of October 1985, the only category to register an increase in employment (either total or production worker) was the upholstered segment which showed a gain of 1.6% in both groups.

The decline in employment for the furniture industry can almost assuredly be attributed to the increased competitiveness of foreign manufacturers. Factors aiding the foreign competition were the high value of the U.S. dollar and the lower labor costs outside the U.S. This has led many retailers to buy merchandise directly from overseas manufacturers while several U.S. manufacturers are now sourcing off-shore on a selective basis.

Employment & Earnings in the Household Furniture & Bedding Industry, 1983, 1984, October 1985

	October			Annual Average		
	1985(p)	1984	% Change 1985/1984	1984	1983	% Change 1984/1983
Wood household furniture:						
Total employees (thous.)	130.6	132.1	- 1.1%	132.0	125.7	+ 5.0%
Production workers (thous.)	113.8	115.0	- 1.0	114.8	108.6	+ 5.7
Average weekly earnings	$244.77	$234.00	+ 4.6	$228.31	$217.62	+ 4.9
Average weekly hours	39.8	40.0	- 0.5	39.5	39.0	+ 1.3
Average overtime hours	2.6	2.8	- 7.1	2.4	2.2	+ 1.9
Upholstered household furniture:						
Total employees (thous.)	94.7	93.2	+ 1.6	92.3	86.2	+ 7.1
Production workers (thous.)	77.9	76.7	+ 1.6	32.7	30.3	+ 7.9
Average weekly earnings	$280.86	$275.12	+ 2.1	$261.89	$250.37	+ 4.6
Average weekly hours	38.9	39.7	- 2.0	38.4	38.4	—
Average overtime hours	2.2	2.3	- 4.3	1.6	1.5	+ 6.7
Metal household furniture:						
Total employees (thous.)	25.8	26.4	- 2.3	26.5	28.0	- 5.4
Production workers (thous.)	20.6	20.9	- 1.4	22.6	21.3	+ 6.1
Average weekly earnings	$286.44	$267.06	+ 7.2	$258.80	$255.37	+ 1.3
Average weekly hours	40.4	39.8	+ 1.5	40.0	40.6	- 1.5
Average overtime hours	3.0	2.3	+30.4	2.5	2.8	-10.7
Mattresses & bedsprings:						
Total employees (thous.)	28.0	29.7	- 5.7	28.9	29.4	- 1.7
Production workers (thous.)	21.5	22.9	- 6.1	22.6	21.8	+ 3.7
Average weekly earnings	$268.87	$270.90	- 0.7	$267.78	$270.05	- 0.9
Average weekly hours	38.3	38.7	- 1.0	38.2	38.8	- 1.5
Average overtime hours	2.2	1.8	+22.2	1.7	2.3	-26.1

(p) preliminary

Source: U.S. Bureau of Labor Statistics, *Employment & Earnings*

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

While most manufacturers of household furniture tend to be small operations with less than 20 employees, it is the large operations with more than 100 employees which dominate shipments.

Nearly seven out of every ten plants in the wood furniture segment had fewer than 20 employees, yet the one out of ten with 100 or more accounted for 72% of industry shipments, according to the 1982 census of manufactures.

As part of the census program, within the next few weeks the Census Bureau will issue further details on industry concentration in the report "Concentration Ratios in Manufacturing" (Subject Series MC82-S).

The Household Furniture & Bedding Industry By Employment Size, 1982

	Establishments		Value added by Manufacture		Industry Shipments	
	Number	Percent	Mil. $	Percent	Mil. $	Percent
Wood household furniture, total	2,607	100.0%	$2,715.0	100.0%	$5,056.6	100.0%
By establishment size:						
Under 20 employees	1,774	68.0	201.5	7.4	389.8	7.7
20 - 49 employees	377	14.5	250.1	9.2	499.8	9.9
50 - 99 employees	178	6.8	284.6	10.5	524.4	10.4
100 - 499 employees	231	8.9	1,167.8	43.0	2,147.7	42.4
500 or more employees	47	1.8	811.0	29.9	1,494.9	29.6
Upholstered household furniture, total	1,227	100.0	$1,745.3	100.0	$3,505.3	100.0
By establishment size:						
Under 20 employees	625	50.9	92.4	5.3	189.4	5.4
20 - 49 employees	246	20.0	175.7	10.1	355.3	10.1
50 - 99 employees	174	14.2	292.3	16.7	592.2	16.9
100 - 499 employees	165	13.4	837.2	48.0	1,732.0	49.4
500 or more employees	17	1.4	347.7	19.9	636.4	18.2
Metal household furniture, total	454	100.0	$ 807.0	100.0	$1,590.7	100.0
By establishment size:						
Under 20 employees	249	54.8	41.9	5.2	87.1	5.5
20 - 49 employees	75	16.5	63.0	7.8	134.6	8.5
50 - 99 employees	48	10.6	108.3	13.4	213.7	13.4
100 - 499 employees	76	16.7	436.6	54.1	873.9	54.9
500 or more employees	6	1.3	157.2	19.5	281.4	17.7
Mattresses & bedsprings, total	902	100.0	$ 882.4	100.0	$1,935.4	100.0
By establishment size:						
Under 20 employees	566	62.7	117.0	13.3	269.0	13.9
20 - 49 employees	195	21.6	216.6	24.5	476.5	24.6
50 - 99 employees	96	10.6	264.1	29.9	570.6	29.5
100 - 499 employees	44	4.9	284.6	32.2	619.3	32.0
500 or more employees	1	0.1				

(continued)

Concentration in the Industry (continued)

The Household Furniture & Bedding Industry
By Employment Size, 1982
(continued)

	Establishments		Value added by Manufacture		Industry Shipments	
	Number	Percent	Mil. $	Percent	Mil. $	Percent
Wood T.V. & radio cabinets, total	83	100.0%	$ 152.1	100.0%	$ 306.6	100.0%
By establishment size:						
Under 20 employees	46	55.4	5.2	3.4	9.8	3.2
20 - 49 employees	16	19.3	10.1	6.6	22.7	7.4
50 - 99 employees	9	10.8	13.7	9.0	26.8	8.7
100 - 499 employees	8	9.6	49.7	32.7	97.8	31.9
500 or more employees	4	4.8	73.4	48.3	149.5	48.8
Household furniture, n.e.c., total	202	100.0	153.3	100.0	381.1	100.0
By establishment size:						
Under 20 employees	139	68.8	15.1	9.9	32.4	8.5
20 - 49 employees	33	16.3	28.1	18.3	60.0	15.7
50 - 99 employees	13	6.4	22.2	14.5	43.3	11.4
100 - 499 employees	16	7.9	88.0	57.4	245.3	64.4
500 or more employees	1	0.5				

n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census,
Census of Manufacturers, 1982 MC82-I-25A

Number of Manufacturing Establishments in the Furniture & Bedding Industry
By Employment Size & Total Employment, 1983

	SIC 251 Household Furniture		SIC 2511 Wood Household Furniture		SIC 2512 Upholstered Household Furniture		SIC 2514 Metal Household Furniture	
	Estabs.	Employees	Estabs.	Employees	Estabs.	Employees	Estabs.	Employees
Total establisnments	5,285	262,738	2,503	123,248	1,169	70,743	436	29,109
Number by employment size:								
Under 20 employees	3,223	na	1,699	9,194	567	na	227	1,593
20-49 employees	934	29,184	355	11,115	247	7,899	81	2,490
50-99 employees	510	35,878	180	12,723	161	11,337	43	3,224
100-499 employees	540	114,321	226	52,325	177	35,169	75	14,745
500-999 employees	64	41,955	33	21,688	15	9,536	10	7,057
1,000 or more	na	na	10	16,203	2	na	—	—

(continued)

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Number of Manufacturing Establishments in the Furniture & Bedding Industry By Employment Size & Total Employment, 1983

	SIC 2515 Mattresses & Bedsprings		SIC 2517 Wood TV & Radio Cabinets		SIC 2519 Household Furniture, n.e.c	
	Estabs.	Employees	Estabs.	Employees	Estabs.	Employees
Total establishments	898	25,953	75	6,013	189	7,626
Number by employment size:						
Under 20 employees	543	na	43	258	129	na
20-49 employees	206	6,248	15	511	30	921
50-99 employees	103	6,987	9	626	14	981
100-499 employees	45	8,275	2	4,618	15	na
500-999 employees or more	1	na	6		1	na

n.e.c. not elsewhere classified
na not available

Source: U.S. Bureau of the Census, County Business Patterns, 1983

Big Employers (Plants) & Their Share of Furniture Industry Shipments, 1984

	Number of plants		% of Industry Shipments Accounted for by plants with 100+ Employees
	With 20+ Employees	With 100+ Employees	
Wood household furniture (SIC 2511*)	925	330	80%
Upholstered household furniture (SIC 2512*)	848	251	69
Metal household furniture (SIC 2514*)	258	104	79
Mattresses & bedding (SIC 2515*)	450	75	51
Wood T.V. & radio cabinets (SIC 2517*)	30	16	94
Household furniture n.e.c. (SIC 2519*)	85	19	57

n.e.c. not elsewhere classified
* For definitions of SIC codes, see page 6.

Source: Sales & Marketing Management, "Survey of Industrial Buying Power", April 1985. All Rights Reserved.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

According to the 1982 census of manufactures, of the 2,430 companies classified in the wood household furniture industry (SIC 2511), 182 were multi-unit companies, operating 359 plants (out of a total of 2,607). These companies accounted for 65% of total employment in the industry, 65% of value added by manufacture within the industry, and 65% of industry shipments.

Of the 1,129 companies operating in the upholstered furniture industry in 1982, only 105 were multi-unit companies. These 105 companies had 203 plants (16.5% of the total), accounted for about 53% of total industry employment, had a 59% share of the value added by manufacture in the industry, and accounted for 46% of the value of industry shipments.

In the bedding industry, 72 out of the 786 companies classified in this industry in 1982 were multi-unit companies. Although these larger companies had only 188 plants, or 21% of the total count, they accounted for 46% of total employment; 52% of the industry's value added by manufacture, and 51.3% of the total value of bedding and related products shipped within the industry.

In looking at furniture company growth patterns in 1984, the national accounting firm Seidman & Seidman reported that the large companies (over $40 million in annual volume) realized the most growth. These companies grew 19.2%, while medium-sized companies ($10-$40 million volume) grew 14%. The small companies (under $10 million) reported 13.6% growth, but did show the most improvement from a poor previous year.

Operating Ratios

Selected Operating Radios for the Household Furniture Industry
Selected Years: 1977-1982

	Payroll Per Employee	Production Workers: % of Total Employment	Average Annual Hours: Production Workers	Cost of Materials: % of Value of Shipments
Household furniture:				
Wood				
1982	$11,168	87%	1,806	46%
1980	9,920	87	1,890	46
1977	8,078	88	1,963	46
Upholstered				
1982	12,038	85	1,766	74
1980	10,778	84	1,888	79
1977	8,749	85	1,817	78
Metal				
1982	13,422	80	1,944	49
1980	10,927	83	1,863	51
1977	9,102	82	1,881	52

(continued)

Operating Ratios

Selected Operating Radios for the Household Furniture Industry
Selected Years: 1977-1982
(continued)

	Payroll Per Employee	Production Workers % of Total Employment	Average Annual Hours: Production Workers	Cost of Materials: % of Value of Shipments
Wood TV & Radio Cabinets				
1982	12,657	84	1,831	50
1980	10,733	87	1,892	50
1977	8,308	86	1,889	50
Other (SIC 2519)				
1982	13,608	81	1,950	59
1980	12,000	84	1,895	56
1977	9,169	85	1,912	57
Bedding				
1982	14,071	75	1,874	54
1980	12,277	75	1,885	53
1977	10,353	76	1,910	56

Source: 1982 Census of Manufactures,
Industry Series: MC82-1-25a

Plant Capacity

For the fourth quarter of 1983, household furniture plants operated at 78% of the industry's preferred level of capacity, 10 percentage point above the level for the corresponding quarter of 1982. The preferred level is defined as a level, normally between actual operations and practical capacity, which the manufacturer would prefer not to exceed due to costs or other considerations. The following figures represent the ratio of actual utilization to the preferred level of operations.

Capacity Utilization Rates in the Household Furniture Industry: Fourth Quarters 1980-1983

	1983	1982	1981	1980
Household furniture	78	67	77	76
Wood	72	62	76	75
Upholstered	92	77	80	79
Metal	87	73	71	73
Wood TV, radio cabinets		(not reported)		
Other (SIC 2519)	73	60	88	92
Bedding	na	68	77	73

na not available

Source: U.S. Bureau of the Census, Current Industrial Reports
Survey of Plant Capacity M2-C1

GENERAL INDUSTRY STATISTICS

Leading Manufacturers

Major changes have occurred in the manufacturing structure of the furniture industry in recent years. It has been a period of consolidations, brought on by the recession of four years ago, competition from imports and a growth of public companies. Mergers and consolidations that started about 20 years ago mainly involved the acquisition of furniture operations by companies not in the furniture industry. Now the trend has been for these companies, such as Burlington Industries and Scott Paper, to divest themselves of their furniture properties. As a result, furniture companies have been buying other furniture companies.

Following is a list of the top 10 furniture companies, based on 1984 sales, from a list of the top 50 compiled by HFD. Acquisitions during the year swelled the volume of many on the list in 1984 compared with 1983.

Volume Leaders in Furniture & Bedding Manufacturing
(Sales in millions)

		1984	1983
1.	Interco (Broyhill, Ethan Allen)	550*	$ 539
2.	Sealy, Inc.	485**	461
3.	Bassett Furniture Industries	398*	342
4.	Mohasco (Stratford, Trend Line, Stratolounger, Barcolounger, Peters Revington, Chromcraft, Avon, Super Sagless)	347*	305
5.	La-Z-Boy	255	197
6.	Ohio Mattress (Ohio Sealy, Stearns & Foster, Monterey, Lifetime Foam)	251	99
7.	The Lane Co., Inc. (Lane, Action, HTB, Hickory Tavern, Pearson)	285	227
8.	Simmons, U.S.A.	241	220
9.	Serta	235**	na
10.	Thomasville/Armstrong	230	205

* Estimate
** Includes licensed manufacturing
na not available

Source: HFD (The Weekly Home Furnishings Newspaper), March 18, 1985.

Regional Information

California had the greatest number of plants in four of the six major components of the furniture industry. North Carolina was the leading state in the number of upholstered furniture plants.

On the value of shipment basis, California led in four furniture classifications. Other leading states included New York, in wood furniture; and North Carolina, in upholstered furniture.

GENERAL INDUSTRY STATISTICS

By Regional Information

Leading Manufacturing States in the Household Furniture Industry

	Total	With 20+ Employees	Value added by Manufacture Mil.$	Value of Shipments (Mil. $)
Wood household furniture (SIC 2511*)				
U.S. total	2,607	833	$2,715.0	$5,056.6
Leading states:				
California	480	147	315.6	581.2
North Carolina	219	128	773.6	1,445.8
New York	208	50	111.8	191.7
Florida	179	26	46.9	91.6
Pennsylvania	96	32	77.4	146.0
Tennessee	94	42	125.7	234.7
Massachusetts	92	26	55.4	101.0
Texas	79	20	41.1	80.6
Georgia	75	21	52.4	105.2
Leading states total	1,552	492	1,599.9	2,977.8
Percent of U.S. total	59.5%	59.1%	58.9%	58.9%
Upholstered household furniture (SIC 2512*)				
U.S. total	1,227	602	$1,761.5	$3,505.3
Leading states:				
North Carolina	257	159	578.8	1,163.5
California	215	89	183.7	370.5
Tennessee	85	52	157.3	307.9
Mississippi	74	52	254.4	537.2
New York	68	13	28.0	55.1
Texas	51	33	45.7	88.3
Florida	41	12	(D)	(D)
Pennsylvania	40	16	46.7	91.0
Leading states total	831	426	na	na
Percent of U.S. total	67.7%	70.8%	na	na
Metal household furniture (SIC 2514*)				
U.S. total	454	205	$ 807.0	$1,590.7
Leading states:				
California	81	45	193.5	338.1
New York	62	18	45.6	82.6
Florida	56	22	41.3	83.2
Illinois	28	14	70.2	158.1
Pennsylvania	28	16	39.1	88.3
Texas	21	11	47.5	88.5
North Carolina	20	14	54.7	119.0
Leading states total	296	140	491.9	957.8
Percent of U.S. total	65.2%	68.3%	61.0%	60.2%

(continued)

GENERAL INDUSTRY STATISTICS

By Regional Information

Leading Manufacturing States in the Household Furniture Industry
(continued)

	Establishments		Value added by Manufacture	Value of Shipments
	Total	With 20+ Employees	Mil.$	(Mil. $)
Mattresses & bedsprings (SIC 2515*)				
U.S. total	902	336	$ 882.4	$1,935.4
Leading states:				
California	118	46	143.6	326.0
Texas	78	27	81.9	183.9
Florida	60	21	63.9	131.0
New York	53	15	28.9	58.7
Illinois	36	13	33.6	75.2
North Carolina	34	18	na	na
Ohio	33	15	43.7	101.0
Georgia	31	17	42.9	89.6
Pennsylvania	31	18	28.9	62.8
Leading states total	474	190	na	na
Percent of U.S. total	52.5%	56.5%	na	na
Wood TV & radio cabinets (SIC 2517*)				
U.S. total	83	37	$ 152.1	$ 306.6
Leading states:				
California	26	12	20.1	39.9
New York	14	5	8.2	18.1
Indiana	5	4	na	na
Missouri	3	2	na	na
Arkansas	2	2	na	na
Tennessee	2	1	na	na
North Carolina	1	1	na	na
Pennsylvania	1	1	na	na
Leading states total	43	28	na	na
Percent of U.S. total	52.5%	75.7%	na	na
Household furniture, n.e.c. (SIC 2519*)				
U.S. total	202	63	$ 153.3	$ 381.1
Leading states:				
Florida	43	12	17.9	36.1
California	31	9	17.1	38.5
New York	18	5	5.6	9.5
Illinois	12	4	na	na
Texas	11	3	3.5	8.5
Ohio	6	5	na	na
Pennsylvania	6	2	na	na
Leading states total	127	40	na	na
Percent of U.S. total	62.9%	63.5%	na	na

* For definitions of SIC codes see page 6.
na not available
n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982 MC82-I-25A

PRODUCTION

Physical output in the domestic household furniture industry, as measured by the Federal Reserve Board, registered a decline of 1.6% in 1985 compared with 1984. Office furniture and other nonhousehold components of the index for furniture/fixtures production, however, registered a gain.

An improvement in production is anticipated in 1986. The national accounting firm, Seidman and Seidman, Grand Rapids, Michigan, which tracks industry developments, expects furniture production to increase to about 3% in real terms.

Industrial Production Indexes, Annual Averages 1980-1985
(1977=100)

	1985	1984	1983	1982	1981	1980	% Change 1985/84
Total industrial production	124.5	121.8	109.2	103.1	111.0	108.6	+2.2%
All manufacturing	127.1	123.9	110.2	102.2	110.5	108.2	+2.6
Furniture & fixtures, total	141.6	136.7	118.2	104.5	109.9	108.9	+3.6
Household furniture	112.8	114.7	103.2	88.7	97.4	97.9	-1.6

Source: Board of Governors,
Federal Reserve System, (G.12.3)

PRODUCT SHIPMENTS

Furniture & Bedding

Product shipments -- as opposed to industry shipments covered in foregoing data -- include all products of a specified type, regardless of the industry classification of the producer. Industry shipments, on the other hand, cover both primary and secondary products made within a specific industry classification. For reporting purposes under the Census Bureau system, a manufacturer is classified in only one industry based on its primary product.

Several sources measure progress in the furniture indsutry in terms of the value of shipments. These show a stronger performance for the year 1985 than indicated in the FRB production indexes.

According to the International Trade Administration, U.S. Department of Commerce, product shipments of household furniture, adjusted for inflation, increased an estimated 2.5% in 1985, following average annual real growth of 8.8% in 1983 and 1984. Upholstered furniture continued to outpace other household furniture sectors, growing at a real rate of 4%. This growth is attributed to a strong demand for recliners and for modular furniture.

The ITA expects contant-dollar domestic shipments of furniture to grow between 2.5 and 3.5% compounded annually during the next five years. Total domestic shipments in 1986, alone, are expected to be up about 2.0% in constant dollars, with bedding products up 3.0%; upholstered, 2.5%.

PRODUCT SHIPMENTS

Furniture & Bedding

The forecast for total household furniture shipments in 1985, compiled by the ITA, amounted to $16,333 million, up 5.9% in current dollars compared with 1984, and up 2.5% when adjusted for inflation. Wood household furniture accounted for 40% of the 1985 total; upholstered, 28.7%; metal, 11.0%; mattresses and bedsprings, 14.9%.

Household Furniture Shipments By U.S. Manufacturers, 1982-1986

	Millions of Dollars (Current$)				Percent Increase (1982$)			
	1985*	1984	1983	1982	1986/85**	1985/84	1984/83	1983/82
Total	$16,333	$15,423	$13,720	$12,353	2.1	2.5	9.0	8.5
Wood household furniture	6,538	6,217	5,457	4,846	1.5	1.5	8.5	7.9
Upholstered furniture	4,692	4,359	3,773	3,320	2.5	4.0	12.5	11.0
Metal household furniture	1,792	1,717	1,604	1,517	1.5	2.5	7.0	5.3
Mattresses & springs	2,432	2,297	2,146	2,043	3.0	2.5	6.0	5.9

* Estimate
** Forecast

Source: U.S. Department of Commerce,
International Trade Administration,
1986 U.S. Industrial Outlook

Seidman & Seidman has estimated 1985 shipments of wood and upholstered furniture at $12.2 billion compared with $11.3 billion in 1984, and projects a 1986 total at about $13 billion. The continued drop in oil prices, bringing lower interest rates, has triggered a jump in housing sales beyond expectations when early forecasts for 1986 were made, and the year may well be stronger for furniture business than had been anticipated.

Reporting at an economic outlook conference in December 1985, the American Furniture Manufacturers Association expected furniture shipments in 1986 (not including bedding) would total $14.6 billion compared to $13.5 billion in 1985. Industry shipments by this source were projected to $16.3 billion in 1987.

Shipments of wood household furniture were projected by the AFMA to total $7 billion in 1986, $7.8 billion in 1987; upholstered: $5.1 billion in 1986, $5.6 billion in 1987; metal furniture and other furniture categories: $2.5 billion in 1986, $2.8 billion in 1987.

PRODUCT SHIPMENTS

Furniture & Bedding

The trend in furniture shipments and orders for the year 1985 compared with the 1984 period was reported by the AFMA as follows:

Household Furniture Shipments, Orders Booked & Unfilled Orders At Year End

	Percent Change, 1985/1984		
	Orders Booked	Shipments	Unfilled Orders
Total	+ 6.9	+ 6.2	+ 5.6
Upholstered furniture	+ 9.3	+ 7.4	+ 8.5
Recliners	+ 4.7	+ 2.2	--
Case goods	+ 5.5	+ 5.5	+ 4.4
Occasional	+ 6.4	+14.3	+34.7
Dining room	+ 0.2	- 1.6	+ 4.2
Bedroom	+ 2.8	- 2.6	-12.2

Source: American Furniture Manufacturers Association, Survey of Current Business (March 11, 1986)

Furniture By Type

Monthly Pattern in Furniture Orders Booked, 1985
(Based on AFMA Value Indexes)

	Total	Upholstered Furniture	Goods
Year 1985	100.0%	100.0%	100.0%
January	7.6	7.5	8.7
February	8.2	7.8	7.9
March	9.1	9.4	8.1
April	7.9	8.3	6.6
May	8.1	7.6	8.1
June	7.7	7.6	7.9
July	7.0	6.1	8.6
August	8.8	10.5	8.9
September	8.9	9.0	9.0
October	9.5	9.5	9.0
November	9.4	9.3	10.2
December	7.8	7.4	6.8

Source: Based on American Furniture Manufacturers Association reports.

PRODUCT SHIPMENTS

Furniture By Type

The latest official data on product shipments in the furniture industry is from the 1983 Annual Survey of Manufactures, compiled by the U.S. Census Bureau in intercensual years. According to the ASM, the value of furniture shipments (excluding bedding) increased 12.6% between 1932 and 1983, reaching $11.6 billion.

The largest increase in shipments during the period was in the outdoor/unpainted/unassembled furniture category, which recorded a gain of almost 30% during the period. The climb of knock-down furniture as well as small-scale furniture is expected to continue as consumers move to smaller house and are forced to conserve on space.

Value of Shipments of Household Furniture
By All U.S. Producers, 1982, 1983

	Value of Shipments (Mil. $)		% Change
	1983	1982	1983/1982
Total reported	$11,574.1	$10,310.2	+ 12.3%
Wood household furniture, total	5,457.4	4,846.1	+ 12.6
Living room, family room & den furniture	1,356.4	1,221.7	+ 11.0
Dining room, kitchen furniture, except cabinets	1,171.7	1,014.7	+ 15.4
Bedroom furniture	1,716.6	1,515.7	+ 13.3
Infants' & children's furniture	188.0	158.8	+ 18.4
Outdoor & unpainted, unassembled furniture	323.0	249.9	+ 29.2
Wood household furniture, n.s.k.	691.6	685.4	+ 0.9
Upholstered wood household furniture	3,772.8	3,319.8	+ 13.6
Metal household furniture, total	1,604.2	1,517.4	+ 5.7
Dining & dinette furniture	388.5	360.7	+ 7.7
Kitchen furniture	63.3	61.8	+ 2.4
Porch, lawn, outdoor & casual furniture	400.1	399.4	+ 0.2
Other metal household furniture	591.0	539.2	+ 9.6
Metal household furniture, n.s.k.	161.3	156.3	+ 3.2
Wood TV and radio cabinets	338.4	302.4	+ 11.9
Household furniture, n.e.c.	401.3	324.5	+ 23.5

n.s.k. not specified by kind
n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1983:
Value of Product Shipments M83(AS)-2,
1982 Census of Manufactures

PRODUCT SHIPMENTS

Furniture By Type

The most comprehensive reports on quantity and value of shipments of furniture products shipped by all manufacturers are published in the 1982 Census of Manufactures reports. The census covers all manufacturers, and reports are much more detailed than the ASM reports. Comparisons are shown in the following table with the 1977 census data.

Quantity & Value of Shipments of Household Furniture, by All Producers, Detailed by Type, 1977, 1982

	Quantity (Thousands of Units)			Value (Millions of $)		
	1982	1977	% Change 1982/1977	1982	1977	% Change 1982/1977
Wood household furniture, total	na	na	—	$4,846.1	$3,890.7	+ 24.6%
Wood living room, library, family room & den furniture, except sewing machine cabinets	na	na	—	1,221.7	859.8	+ 42.1
Cabinets, including record, music etc., excl. sewing machine, radio, phono & TV cabinets	na	na	—	129.2	61.6	+109.7
Chairs, except dining room chairs	na	2,019.8	—	62.6	48.1	+ 30.1
Rockers	na	494.7	—	37.1	23.4	+ 58.5
Tables, except card & phone tables	6,010.4	9,844.0	- 38.9%	499.5	441.4	+ 13.2
Desks	na	535.8	—	137.7	58.0	+137.4
Credenzas, bookcases & bookshelves, except wall units	na	na	—	71.7	77.4	- 7.8
Wall units, desks, bookcases & storage types	na	na	—	123.5	90.7	+152.2
Other nonupholstered living room furniture	na	na	—	105.3		
Wood living room, library, family room, & den furniture, except sewing machine cabinets, n.s.k.	na	na	—	55.0	59.2	- 7.1
Wood dining room & kitchen furniture, except cabinets	na	na	—	1,014.7	962.6	+ 5.4
Tables, 30 x 40 inches or more, dining room	na	1,673.8	—	250.7	222.4	+ 12.7
Chairs, dining room	6,049.2	10,526.9	- 42.5	378.8	375.6	+ 0.9
Buffets & servers, dining room	468.1	795.9	- 41.1	107.8	132.5	- 18.6
China & corner cabinets, dining room	669.7	588.7	+ 13.7	156.4	128.0	+ 22.7
Other dining & kitchen furniture	na	na	—	83.8	43.2	+ 85.4
Wood dining room & kitchen furniture excl. cabinets, n.s.k.	na	na	—	37.3	56.6	+ 34.1

(continued)

PRODUCT SHIPMENTS

Furniture By Type

Quantity & Value of Shipments of Household Furniture, by All Producers Detailed by Type, 1977, 1982
(continued)

	Quantity (Thousands of Units) 1982	Quantity (Thousands of Units) 1977	Quantity % Change 1982/1977	Value (Millions of $) 1982	Value (Millions of $) 1977	Value % Change 1982/1977
Wood bedroom furniture	na	na	—	$1,515.7	$1,290.3	+ 17.5%
Beds, excl. headboards & headboard beds, bunk beds, cribs, cradles, Hollywood beds & youth beds	na	1,626.4	—	188.1	110.3	+ 70.5
Headboards & headboard beds, incl. padded	na	3,553.9	—	188.2	168.8	+ 11.5
Bunk beds, excl. mattresses & detachable springs	na	446.1	—	48.7	30.4	+ 60.2
Dressers, vanities & dressing tables	1,967.4	3,075.8	- 36.0	325.8	343.9	- 5.3
Wardrobes, chifforobes, armoires & wardrobe-type cabinets	na	204.7	—	76.8	44.4	+ 73.0
Chest of drawers	2,099.5	2,722.3	- 22.8	257.6	226.2	+ 13.9
Cedar chests	219.2	256.5	- 14.5	34.9	26.4	+ 32.2
Night tables & stands	2,221.7	2,899.0	- 23.4	161.2	133.5	+ 20.7
Other nonupholstered bedroom furniture	205.3	na	—	165.5	123.6	+ 33.9
Wood bedroom furniture, n.s.k.	na	na	—	69.1	82.8	- 16.5
Infants' & children's wood furniture	na	na	—	158.8	118.8	+ 33.7
Cribs, incl. springs sold as part of crib	na	(S)	—	74.8	47.7	+ 56.8
Other infants' & children's furniture	na	na	—	83.8	59.3	+ 41.3
Infants' & children's wood furniture, n.s.k.	na	na	—	0.1	11.8	- 99.2
Wood outdoor furniture, unpainted wood furniture & unassembled & knock-down wood furniture	na	na	—	249.9	185.8	+ 34.5
Porch, lawn, beach & similar wood furniture: chairs, rockers, benches & chaise lounges, incl. steamer & deck chairs	na	2,468.7	—	62.4	53.2	+ 17.3
Other wood porch, lawn, beach & similar furniture	na	na	—	37.5	24.3	+ 54.3
Unpainted wood furniture (furniture-in-the-white): Chest of drawers	na	na	—	88.4	50.4	+ 75.4
Unassembled or knock-down furniture, unpainted or finished, sold in kits	na	na	—	49.2	46.7	+ 5.4
Wood outdoor funiture, unpainted wood furniture & unassembled & knock-down wood furniture, n.s.k.	na	na	—	12.5	11.2	+ 11.6
Wood household furniture, n.s.k.	na	na	—	685.4	473.7	+ 44.7

(continued)

PRODUCT SHIPMENTS

Furniture By Type

Quantity & Value of Shipments of Household Furniture, by All Producers, Detailed by Type, 1977, 1982
(continued)

	Quantity (Thousands of Units)			Value (Millions of $)		
	1982	1977	% Change 1982/1977	1982	1977	% Change 1982/1977
Upholstered wood furniture, total	na	na	—	$3,319.8	$2,735.7	+ 21.4%
Sofa, davenports (excl. dual-purpose), settees & love seats excl. chairs sold as part of suites & sectional sofa pieces	6,414.8	6,729.1	- 4.7%	1,397.7	1,194.2	+ 17.0
Chairs, except reclining	3,737.2	5,077.8	-26.4	510.0	469.4	+ 8.6
Sectional sofa pieces, incl. pieces seating one person	639.1	801.4	+20.2	132.9	106.0	+ 25.4
Rockers, incl. swivel rockers	na	1,438.0	—	137.3	120.6	+ 13.8
Reclining chairs, all types	3,037.0	3,504.8	-13.3	524.7	352.9	+ 48.7
Other upholstered wood household furniture	na	na	—	111.1	99.4	+ 11.8
Upholstered household furniture, n.s.k.	na	na	—	506.1	393.2	+ 28.7
Metal household furniture, total	na	na	—	1,517.4	1,231.2	+ 23.2
Metal household dining, dinette & breakfast furniture	na	na	—	360.7	319.1	+ 13.0
Tubular metal, incl. chairs whether padded or plain:						
Sets (tables & chairs)	1,387.8	2,260.9	- 38.6	266.6	246.1	+ 8.3
Tables (not sold with a set)	857.2	675.3	+ 26.9	33.0	16.9	+ 95.3
Chairs (not sold with a set)	997.1	923.7	+ 7.9	18.4	13.4	+ 37.3
Other metal dinette, dining & breakfast furniture	na	na	—	41.2	35.7	+ 15.4
Metal household dining, dinette & breakfast furniture, n.s.k.	na	na	—	1.5	7.0	- 78.6
Metal kitchen furniture	na	na	—	61.8	73.4	- 15.8
Kitchen furniture, excl. furniture reported as "dining, dinette & breakfast furniture":						
Cabinets (base, top, base wall, utility, etc)	744.9	na	—	27.2	49.6	- 45.2
Stools, padded & plain	975.5	1,142.5	- 14.6	25.6	17.2	+ 48.8
Tables, incl. hostess carts	na	307.1	—	5.3	5.5	- 3.6
Metal kitchen furniture, n.s.k.	na	na	—	3.7	1.1	+236.4
Metal porch, lawn, outdoor & casual furniture	na	na	--	399.4	275.9	+ 44.8
Tubular aluminum:						
Chairs, rockers, benches, chaise lounges & settees	3,893.3	11,304.0	- 65.5	215.6	122.5	+ 76.0
Other tubular aluminum porch, lawn & outdoor furniture	na	na	—	55.8	29.2	+ 91.1

(continued)

PRODUCT SHIPMENTS

Furniture By Type

Quantity & Value of Shipments of Household Furniture, by All Producers, Detailed by Type, 1977, 1982
(continued)

	Quantity (Thousands of Units)			Value (Millions of $)		
	1982	1977	% Change 1982/1977	1982	1977	% Change 1982/1977
Cast & wrought iron:						
Chairs, rockers, benches, chaise lounges & settees	819.4	1,221.1	- 32.9	$ 46.1	$ 44.7	+ 3.1
Other cast & wrought iron porch, lawn & outdoor furniture	na	na	—	35.1	15.5	+ 26.5
Other metal porch, lawn, outdoor & casual furniture	na	na	—	27.0	37.4	- 27.8
Metal proch, lawn, outdoor & casual furniture	na	na	—	19.8	26.6	- 25.6
Other metal household furniture	na	na	—	539.2	445.5	+ 21.0
Folding cots, rollable cots, army cots, & other metal beds	921.6	687.7	+ 34.0	57.5	15.6	+268.6
Metal bed frames(with or without a headboard)	na	6,797.4	—	93.2	77.8	+ 19.8
Upholstered metal household furniture	na	na	—	9.9	12.4	- 20.2
Card tables & chairs	na	na	—	na	na	—
Medicine cabinets, incl. wall type & insert type	2,371.9	3,804.4	- 37.6	70.9	72.1	- 1.7
Metal radio, phonograph, TV & hi-fi cabinets	na	295.4	—	na	5.1	—
Infants' high chairs	1,000.0	985.2	+ 1.5	20.8	12.2	+ 70.5
Infants' car seats	1,032.0	1,051.3	- 1.8	35.6	19.7	+ 80.7
Other infants' & children's metal furniture	2,026.2	3,066.5	- 33.9	60.0	47.6	+ 26.1
Other metal household furniture	na	na	—	130.1	na	—
Other metal household furniture, n.s.k.	na	na	—	11.7	32.5	- 64.0
Metal household furniture, n.s.k.	na	na	—	156.3	117.3	+ 33.2
Wood TV & radio cabinets, total	na	na	—	302.4	312.8	- 3.3
Console phono cabinets & audio cabinets, incl. radio, phono & hi-fi cabinets	na	1,450.5	—	51.3	82.3	- 37.7
TV cabinets & combinations, TV, hi-fi & radio	3,753.4	4,512.9	- 16.8	211.9	171.1	+ 23.8
Sewing machine cabinets	246.2	651.5	- 62.2	24.6	41.7	- 59.0
Wood TV, radio & sewing machine cabinets, n.s.k.	na	na	—	14.6	17.7	- 17.5

(continued)

Furniture By Type

Quantity & Value of Shipments of Household Furniture, by All Producers, Detailed by Type, 1971, 1982
(continued)

	Quantity (Thousands of Units)			Value (Millions of $)		
	1982	1977	% Change 1982/1977	1982	1977	% Change 1982/1977
Household furniture, n.e.c., total	na	na	—	$ 324.5	$ 281.8	+ 15.2%
Plastics & fibrous glass cainets incl. radio, TV, phono, hi-fi & combinations	na	na	—	89.3	85.1	+ 4.9
Reed & rattan furniture, incl. willow, wicker & cane	na	na	—	87.3	42.4	+105.9
Other plastics & fibrous glass household furniture, excl. cabinets	na	na	—	88.2	87.3	+ 1.0
Other household furniture, except wood, metal, plastics or fibrous glass, incl. corrugated furniture	na	na	—	26.9	35.5	- 24.2
Household furniture, n.e.c., n.s.k.	na	na	—	32.8	31.5	+ 4.1

na not available n.e.c. not elsewhere classified n.s.k. not specified by kind.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Industry Series (MC82-I-25A.)

Bedding

Fourth quarter 1985 unit sales, up 6.7% from a year earlier, along with wholesale dollars up 8.4%, brought a strong close to 1985's conventional bedding sales, according to the National Association of Bedding Manufacturers. However, soft business conditions in earlier months resulted in an overall unit gain for the year 1985 of 1.4% and a dollar gain of close to 5% compared with 1984.

Innerspring mattress sales for the last quarter were up 6.7% in units and 9.6% in dollars. Spring foundations were up 7.1% in both units and dollars; foam mattresses showed a small gain (1.6%) in units, but dollars were up 6% in the last 1985 quarter. Foam foundations, with a unit gain of 6.3%, showed a strong dollar gain of 16.6%.

The latest available figures for waterbed sales are for 1983, and are in terms of retail sales. In that year, 2.5 million units were sold, an increase of 23% over 1982, and waterbeds accounted for 18% of the bedding market, according to Facts Consolidated of Los Angeles, based on a survey for the Waterbed Manufacturers Association. Retail sales of frames and related case goods hit almost $1.3 billion in 1983 compared with $937 million in 1982. Sales of 3 million units, valued at retail at $2.5 billion were projected for 1984.

The U.S. Bureau of the Census, 1983 Annual Survey of Manufactures, shows the value of product shipments of mattresses, and bedsprings, etc., increased by 5.1% in 1983, climbing to $2.1 billion. The main cause of the increase was a jump in shipments of conventional waterbeds. Value of shipments was up over 40% in the year, reaching $58.3 billion.

PRODUCT SHIPMENTS

Bedding (continued)

The largest bedding category, innerspring mattresses, recorded a gain of 8.3% in 1983 and accounted for about 35% of overall shipments.

Comparisons of findings on bedding shipments in 1983, based on the ASM, and in 1982, based on the Census of Manufactures, are shown in the table below. This is followed by detailed information on 1982 and 1977 shipments by product type, available only on census reports.

Value of Shipments of Bedding
By All U.S. Producers, 1982, 1983

	(Mil. $) 1983	(Mil. $) 1982	% Change 1983/1982
Bedding, total	$2,145.8	$2,042.6	+ 5.1%
Innerspring mattresses, except crib size	763.6	705.3	+ 8.3
Other mattresses, including crib size	161.2	159.1	+ 1.3
Foundations	494.4	461.3	+ 7.2
Dual purpose sleep furniture	385.4	396.2	- 2.7
Sleep system ensembles, exc. water beds	22.7	23.9	- 5.0
Conventional water beds	58.5	41.3	+41.6
Mattresses & bedsprings, n.s.k.	259.9	255.6	+ 1.7

n.s.k. not specified by kind

Source: U.S. Bureau of the Census,
Annual Survey of Manufactures, 1983
Value of Product Shipments M(83)AS-2;
1982 Census of Manufactures.

Quantity & Value of Shipments of Bedding By All Producers
Detailed By Type, 1977, 1982

	Quantity (Thousands of Units)			Value (Millions of $)		
	1982	1977	% Change 1982/1977	1982	1977	% Change 1982/1977
Mattresses & bedsprings, total	na	na	—	$2,042.6	$1,481.5	+ 37.8%
Innerspring mattresses, excluding crib size	9,375.8	9,638.1	- 2.7%	705.3	492.6	+ 43.2
Other mattresses, incl. crib & inserts	na	na	—	159.1	108.3	+ 46.9
Crib mattresses, all types	na	1,356.2	—	29.6	17.9	+ 65.4
Foam core mattresses, excl. crib	na	1,726.7	—	53.5	65.5	- 18.3
All other mattresses	1,160.3	na		37.0		
Mattress inserts for dual purpose furniture:					6.9	+649.3
Innerspring	na	na	—	11.3		
Foam	na	na		3.4		
Other mattresses, n.s.k.	na	na	—	24.3	18.0	+ 35.0

(continued)

PRODUCT SHIPMENTS

Bedding

Quantity & Value of Shipments of Bedding By All Producers Detailed By Type, 1977, 1982
(continued)

	Quantity (Thousands of Units)			Value (Millions of $)		
	1982	1977	% Change 1982/1977	1982	1977	% Change 1982/1977
Foundations, exc. innerspring units, hybrid floatation & adjustable ensembles	—	—	—	461.3	360.6	+ 27.9
Spring	na	8,333.9	—	367.0	336.8	+ 22.6
Foam	618.5			30.2		
All other	na			15.7		
Foundations n.s.k.	—	—	—	48.4	23.8	+103.4
Dual purpose sleep furniture	—	—	—	369.2	334.4	+ 10.4
Convertible sofas	na	na	—	335.9	302.6	+ 11.0
All other dual purpose sleep furniture	na	na	—	30.3	31.8	- 4.7
Sleep system ensembles, excluding conventional water beds	—	—		23.9	—	—
Hybrid type floatation ensembles	na	na		9.9		
Air bed ensembles	na	na	—	na	*	—
Electric adjustable sleep ensemble	na	na		na		
Sleep system ensembles, n.s.k.	na	na	—	3.3		
Conventional water beds	na	na	—	41.3	*	—
Mattresses & bedsprings, n.s.k.	na	na	—	275.6	185.6	+ 48.5

* Included with mattresses & bedsprings, n.s.k. in 1977
na not available
n.s.k. not specified by kind

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Industry Series, MC82-I-25A

By Geographic Region

California was the leading state for shipments in nine of the 15 categories of furniture and bedding measured by the Census Bureau in 1982, while North Carolina led in four others. In 1977, California was the leader in seven categories; North Carolina led in four.

The only two categories in which California, or North Carolina were not the leaders in product shipments in 1982 were infants' & children's wood furniture (Wisconsin) and metal kitchen furniture (Illinois).

PRODUCT SHIPMENTS

By Geographic Region

Value of Product Shipments of Household Furniture By Leading States 1982, 1977

(Millions of dollars)

	1982	1977	% Change 1982/1977
Wood living room, library, family room and den furniture			
U.S. total	$1,221.7	$ 859.8	+ 42.1%
Leading States:			
North Carolina	314.4	206.4	+ 52.3
Virginia	148.2	95.3	+ 55.5
California	110.2	64.1	+ 71.9
Indiana	63.1	53.2	+ 18.6
Tennessee	44.5	29.7	+ 49.8
Leading states total	680.4	448.7	+ 51.6
Percent of U.S. total	55.7%	52.2%	--
Wood dining room and kitchen furniture, exc. cabinets			
U.S. total	1,014.7	962.3	+ 5.4
Leading States:			
North Carolina	417.6	431.9	- 3.3
Virginia	123.5	121.7	+ 1.5
California	63.5	68.8	- 7.7
New York	45.9	30.3	+ 51.4
Massachusetts	45.2	33.9	+ 33.3
Leading states total	695.7	686.6	+ 1.3
Percent of U.S. total	68.6%	71.3%	--
Wood bedroom furniture			
U.S. total	1,515.7	1,290.3	+ 17.4
Leading States:			
North Carolina	532.6	409.7	+ 30.0
Virginia	300.9	244.3	+ 23.2
California	146.5	91.0	+ 61.0
Tennessee	109.8	99.0	+ 10.9
South Carolina	55.3	35.9	+ 54.0
Leading states total	1,145.1	879.9	+ 30.1
Percent of U.S. total	75.5%	68.2%	--
Infants' and children's wood furniture			
U.S. total	158.8	118.8	+ 33.7
Leading states:			
Wisconsin	38.6	20.6	+ 87.3
California	20.2	na	--
Leading states total	58.8	na	--
Percent of U.S. total	37.0	na	--

(continued)

PRODUCT SHIPMENTS

By Geographic Region

Value of Product Shipments of Household Furniture By Leading States 1982, 1977

(Millions of dollars)
(continued)

	1982	1977	% Change 1982/1977
Wood, outdoor, unpainted and unassembled furniture			
U.S. total	$ 249.9	$ 185.5	+ 34.7%
Leading states:			
California	54.2	48.3	+ 12.2
Pennsylvania	20.7	16.2	+ 27.8
Georgia	17.9	8.2	+118.3
New York	16.4	7.1	+131.0
Indiana	13.0	12.1	+ 7.4
Leading states total	122.2	91.9	+ 33.0
Percent of U.S. total	48.9%	49.5%	--
Metal household dining, dinette and breakfast furniture			
U.S. total	360.7	319.1	+ 13.0
Leading states:			
California	120.5	72.4	+ 66.4
North Carolina	49.3	31.4	+ 57.0
Pennsylvania	22.5	26.5	- 15.0
New York	8.0	9.4	- 14.9
Florida	3.4	na	na
Leading states total	203.7	na	na
Percent of U.S. total	56.5	na	--
Metal kitchen furniture			
U.S. total	61.8	73.4	- 15.8
Leading states:			
Illinois	14.2	28.6	- 23.7
Pennsylvania	5.8	na	na
Leading states total	20.0	na	na
Percent of U.S. total	32.3	na	na
Metal, porch, lawn outdoor and casual furniture			
U.S. total	399.4	275.9	+ 44.8
Leading states:			
California	72.3	41.0	+ 76.3
Florida	45.4	24.2	+ 87.6
Alabama	43.6	25.2	+ 73.0
North Carolina	38.5	20.1	+ 91.5
Texas	30.4	24.5	+ 24.1
Leading states total	230.2	135.0	+ 70.5
Percent of U.S. total	57.6	48.9	--

(continued)

By Geographic Region

Value of Product Shipments of Household Furniture By Leading States 1982, 1977

(Millions of dollars)
(continued)

	1982	1977	% Change 1982/1977
Other metal household furniture			
U.S. total	$ 539.2	$ 445.5	+ 21.0%
Leading states:			
California	100.1	72.4	+ 38.3
Ohio	78.4	51.7	+ 51.6
Illinois	76.6	78.8	- 2.8
Indiana	55.2	38.4	+ 43.8
Pennsylvania	38.1	35.0	+ 8.9
Leading states total	348.4	276.3	+ 25.9
Percent of U.S. total	64.6%	62.0%	--
Innerspring mattresses, excluding crib			
U.S. total	705.3	492.6	+ 43.2
Leading states:			
California	108.4	62.8	+ 72.6
Texas	71.2	47.3	+ 50.5
New Jersey	62.9	35.5	+ 77.2
Florida	57.5	22.8	+152.2
Ohio	40.3	41.1	- 1.8
Leading states total	340.3	209.5	+ 62.4
Percent of U.S. total	48.2%	42.5%	--
Other mattresses, including crib			
U.S. total	159.1	108.3	+ 46.9
Leading states:			
California	22.8	15.9	+ 43.3
Texas	14.1	7.8	+ 80.8
Illinois	13.8	11.0	+ 25.5
Massachusetts	13.5	2.5	+440.0
Ohio	11.7	5.3	+120.8
Leading states total	75.9	42.5	+ 78.6
Percent of U.S. total	47.7%	39.2%	--
Foundations			
U.S. total	461.3	360.6	+ 27.9
Leading states:			
California	56.7	42.9	+ 32.2
Texas	45.2	31.3	+ 44.4
New Jersey	38.5	18.4	+109.2
Ohio	27.2	39.3	- 30.8
Illinois	26.9	17.6	+ 52.8
Leading states total	194.5	149.5	+ 30.1
Percent of U.S. total	42.2%	41.5%	--

(continued)

By Geographic Region

Value of Product Shipments of Household Furniture By Leading States 1982, 1977
(Millions of dollars)
(continued)

	1982	1977	% Change 1982/1977
Dual purpose sleep furniture			
U.S. total	$ 396.2	$ 334.4	- 18.5%
Leading states:			
North Carolina	61.8	na	--
California	60.0	na	--
Mississippi	46.5	na	--
Texas	36.1	na	--
Tennessee	26.2	na	--
Leading states total	230.6	na	--
Percent of U.S. total	58.2%	na	--
Sleep system ensembles, except conventional water beds			
U.S. total	23.9	na	--
Leading states:			
California	8.4	na	--
Percent of U.S. total	35.1%	na	--
Conventional water beds			
U.S. total	41.3	na	--
Leading states:			
California	33.5	na	--
Percent of U.S. total	81.1%	na	--

na not available

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
MC82-I-25A

PRODUCER PRICES

Producer Price Indexes for Specified Furniture & Bedding, 1983-1985

(1967 = 100 unless otherwise noted)

	Annual Average				
				% Change	
	1985	1984	1983	1985/84	1984/83
All commodities	308.8	310.3	303.1	- 0.5%	+ 2.4%
Household furniture	249.5	242.1	234.7	+ 3.1	+ 3.2
Wood household furniture	281.0	272.5	261.0	+ 3.1	+ 4.4
Living room furniture	266.3	256.1	244.4	+ 4.0	+ 4.8
Tables	262.8	252.8	241.7	+ 3.9	+ 4.6
Desks (6/80=100)	127.1	120.1	116.1	+ 5.8	+ 3.4
Chairs (6/80=100)	137.3	131.6	123.2	+ 4.3	+ 6.8
Credenzas & bookcases (6/80=100)	136.1	130.6	122.8	+ 4.2	+ 6.4
Other nonupholstered living room furniture (6/80=100)	125.8	121.8	116.5	+ 3.3	+ 4.5
Dining room	302.4	295.9	284.5	+ 2.2	+ 4.0
Tables	298.7	293.9	282.3	+ 1.6	+ 4.1
Chairs	321.1	311.0	299.3	+ 3.2	+ 3.9
Buffets & Servers	286.1	273.8	264.3	+ 4.5	+ 3.6
China & corner cabinets	282.3	290.1	277.9	- 2.7	+ 4.4
Other dining room and kitchen furniture (6/80=100)	125.5	121.4	116.7	+ 3.4	+ 4.0
Bedroom	276.9	267.9	256.1	+ 3.4	+ 4.6
Beds, except bunk	283.1	272.4	257.5	+ 3.9	+ 5.8
Headboard sets (6/80=100)	123.4	120.0	116.6	+ 2.8	+ 2.9
Dressers, vanities, & dressing tables	273.3	265.2	253.7	+ 3.0	+ 4.5
Night tables & stands (6/80=100)	132.5	128.4	120.9	+ 3.2	+ 6.2
Chests	269.2	260.6	251.0	+ 3.3	+ 3.8
Wardrobes (6/80 = 100)	127.7	122.1	115.1	+ 4.6	+ 6.1
Other nonupholstered bedroom furniture (6/80=100)	131.7	125.0	117.8	+ 5.4	+ 6.1
Other wood household furniture (6/80=100)	115.2	113.5	110.7	+ 1.5	+ 2.5
Unpainted wood furniture (6/80=100)	127.3	123.7	117.1	+ 2.9	+ 5.6
Upholstered household furniture	226.3	218.3	213.6	+ 3.7	+ 2.2
Sofas, incl. sectional sofa pieces	227.2	217.6	213.6	+ 4.4	+ 1.8
Chairs, incl. rockers & recliners	225.5	218.1	214.0	+ 3.4	+ 1.9
Sofa beds, convertible	216.5	212.9	202.8	+ 1.7	+ 5.0
Other upholstered furniture (6/82=100)	113.6	107.8	104.3	+ 5.4	+ 3.4
Metal household furniture	212.2	210.1	234.7	+ 1.0	- 10.4
Porch & lawn furniture	302.3	293.9	298.9	+ 2.9	- 1.7
Bedding	214.9	208.6	199.7	+ 5.4	+ 4.5
Mattresses, innersprings, other than crib	220.0	213.2	203.1	+ 3.2	+ 5.0
Bedsprings (6/83=100)	102.0	99.8	--	+ 2.2	--

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

Imports has been taking an increasing share of consumer dollars spent on furniture and bedding. In 1985, U.S. imports increased an estimated 30% to $2.6 billion, accounting for 14% of apparent consumption, according to the U.S. International Trade Commission. This was below the 40% increase in 1984, reflecting slower growth of U.S. demand and a weakening value of the U.S. dollar in foreign markets, making imports more expensive (but helping U.S. exporters).

Low-wage countries like Taiwan have a significant advantage in the labor-intensive furniture industry. To an increasing extent imports consist of knock-down furniture. Imports are expected to continue to increase, reaching more than $3.0 billion, despite a weaker dollar.

Canada, Italy, Denmark and West Germany accounted for 40% of total U.S. imports in 1984, while six Far Eastern countries led by Taiwan at 26%, accounted for 36% of imports. The two major Eastern European producers, Yugoslavia and Roumania, supplied a combined 7% of U.S. furniture imports. The severest impact from imports in the U.S. is in occasional furniture and dining room products.

U.S. exports have historically been fairly small, relative to total industry shipments. The problems which U.S. exports face are high transportation costs, different style preferences abroad and unfavorable foreign exchange rates. In addition, economic growth rates in foreign countries have lagged behind that of the United States. To some extent, the trade imbalance is a problem of scale. U.S. producers must make sizable investments to target each foreign market while foreign producers obtain a much higher return on the same investment by targeting the much larger U.S. market.

U.S. exports declined an estimated 15% in 1985 to $177 million, accounting for only 1% of domestic shipments in 1985. This was due primarily to a substantial decline in exports to Saudi Arabia which was the largest export market for U.S. furniture in 1984, accounting for 23% of total exports in that year. Following Saudi Arabia were Canada, at 21%, and Mexico, at 14%.

The International Trade Administration anticipates a 2% gain in U.S. exports of furniture in 1986 on a constant dollar basis.

Foreign Trade in the Furniture & Bedding Industry, 1982-1985
(Millions of $)

	1985(e)	1984	1983	1982	% Change 1985/1984	Compound Annual Growth Rate 1977-1982
Value of Imports*	$2,610	$2,010	$1,435	$1,079	+ 29.9%	18.4%
Import/new supply ratio	0.138	0.115	0.095	0.080	+ 20.0	12.2
Value of Exports	$ 177	$ 208	$ 204	$ 239	- 14.9	11.9
Exports/shipments ratio	0.012	0.011	0.015	0.019	+ 0.1	6.3

(e) estimated
* includes an indeterminant amount of office furniture.

Source: International Trade Administration
U.S. Department of Commerce
1986 U.S. Industrial Outlook

THE POTENTIAL MARKET

Households/Homes

According to the Current Population Survey (CPS), there were approximately 86.8 million households in the U.S. in March 1985, a net increase of 1.4 million over the previous year. Since 1980, the number of households has increased by an average of 1.2 million annually compared with 1.6 million annually between 1970 and 1980.

There were 24.1 million nonfamily households in 1985, 14.0 million maintained by women and 10.1 million maintained by men. These households contain persons who either live alone (20.6 million) or who live with persons to whom they are not related. Although nonfamily households represented just 28% of all households in 1985, they have accounted for about 48% of all the households added since 1980.

One of the major results of the changing household compositions has been the drop in household size. The decline in the average began in the mid-1960's, was interrupted in 1983, but has since resumed. The average number of persons per household in 1985 reached a new low of 2.69 compared with 2.76 in 1980 and 3.14 in 1970.

Number of U.S. Households By Type, 1982-1985
(In thousands as of March of each year)

	1985	1984	1983	1982	% Change 1985/1984
Households, total	86,789	85,407	83,918	83,527	+ 1.6%
Family households, total	62,706	61,997	61,393	61,019	+ 1.1
Nonfamily households, total	24,082	23,410	22,525	22,508	+ 2.9
Living alone	20,602	19,954	19,250	19,354	+ 3.2
Average household size (number)	2.69	2.71	2.73	2.72	--

Source: U.S. Bureau of the Census, Households, Families, Marital Status and Living Arrangements, P-20-No 402

Housing starts and sales trends parallel trends in new household formations. All of these have picked up in the last three years. Conditions favor continued expansion in 1986, fostered by the decline in mortgage rates and in heating costs, and the feeling of well-being created by the gains in equity markets and the decline in inflation rates.

In 1985, 686,000 new private homes were sold. This was 7% more than the 639,000 sold in 1984 and the highest annual figure since 1979 (709,000). Economists generally expect the 1986 total to exceed the 700,000-unit rate, with projections to 725,000 at the high end of the projection. The median sales price of new houses sold in 1985 was $84,100; the average sales price was $100,600. In 1984, the median price was $79,900; the average $97,600.

Of total new private homes sold in 1985, 19.0% were in the Northeast, 11.9% in the Midwest, 44.7% in the South, and 24.4% in the West.

Households/Homes (continued)

About 63.5% of all occupied housing units in the U.S. at the end of 1985 were occupied by their owners. On a regional basis, the lowest rate of owner occupancy (58.5%) was in the West. In the Northeast, the rate was 60.8%; in the Midwest, 66.4%; in the South, 66.0%.

The resale market has picked up, of course, along with new-home sales, as owners trade up to larger or better homes,. According to trade sources, people who move account for about one-quarter of furniture and bedding sales.

Of housing structures completed in 1985, totaling 1,700,000, 61.7% (or 1,071,900) were one-family houses. Structures with 2-to-4 housing units accounted for 5.4%; 5 or more units, 32.9%. Completions of new one-family homes in 1985 gained 4.5% over the 1984 total and rose 30.8% over the 1981 total. Completions of multifamily holdings, which totaled 629,000 in 1985, represented a gain of 40.4% over the 1981 total but were less than 1% higher than in 1984.

Sales of furniture and other homefurnishings are getting a boost from new homeowners, but this is tempered by the fact that the customer base has generally taken on a substantial debt load, reducing immediate willingness to splurge. The bigger potential market may be among movers to bigger homes, who are profiting in sales of first-homes. Sales of existing homes are reported to be up about 20% over year-ago levels.

Trends in New Private Housing, 1981-1985
(Thousands of units or homes)

		New Private Housing Units				
Year	Total	1-unit	2-4 units*	5 or more units*	Units Completed	New Private Homes Sold
1981	1,084.2	705.4	91.1	287.7	1,265.7	436
1982	1,062.2	662.6	80.0	319.6	1,005.5	412
1983	1,703.0	1,067.6	113.5	522.0	1,390.3	623
1984	1,749.5	1,084.2	121.4	544.0	1,652.2	639
1985(p)	1,736.4	1,071.9	93.4	571.0	1,700.0	686

* A unit is a structure which contains domiciles for one or more households.
(p) preliminary.

Source: U.S. Department of Commerce and
U.S. Department of Urban Development.

Most (75.2% of the new one-family homes completed in 1985 had three or more bedrooms. This compares with 76.3% in 1984, 79% in 1981. There were 629,000 units in multifamily buildings completed in 1985, and of these, over half (54.4%) had two bedrooms, 36% had one bedroom. Comparable figures in 1981 were 53% and 34%, respectively.

Households/Homes (continued)

Selected Characteristics of New One-Family Houses And Of New Units in Multifamily Buildings Completed in 1981, 1984, 1985
(in thousands of units)

	1985	1984	1981
One family houses:			
Total completed	1,071	1,025	819
Bedrooms per units:			
2 or less	265	243	172
3 bedrooms	611	595	487
4 bedrooms or more	195	188	160
Average size, entire house (sq. ft.)	1,785	1,780	1,720
Median size, entire house (sq. ft.)	1,605	1,605	1,550
Units in multifamily buildings:			
Total completed	629	627	447
Bedrooms per unit:			
Efficiencies	14	14	11
1 bedroom	227	231	152
2 bedrooms	342	334	237
3 bedrooms	47	48	48
Average size (entire unit) (sq. ft.)	947	914	980
Median size (sq. ft.)	884	871	930

Source: U.S. Department of Commerce &
U.S. Department of Housing & Urban Development

CONSUMER EXPENDITURES FOR FURNITURE

After increasing 9.7% between 1982 and 1983, personal consumption expenditures for furniture and bedding rose 12.6% in 1984 reaching $24.1 billion. These expenditures cover the value at retail of goods reaching the consumer through all channels, including direct sales by manufacturers or wholesalers, etc.

Total U.S. personal consumption expenditures rose 8.5% in 1984 to $2,341.8 billion from $2,155.9 billion in 1983. Thus, furniture and bedding share of personal consumption expenditures was about 1% of total expenditures. In share of total spending for durable goods, however, furniture is now about 7% compared with 12% in the early 1960's, 9.1% in 1972.

U.S. Personal Consumption Expenditures & Share Accounted for by Furniture & Bedding, 1981-1984
(Billions of dollars)

	1984(p)	1983	1982	1981	% Change 1984/83	% Change 1984/81
Personal consumption expenditures:						
U.S. total	$2,341.8	$2,155.9	$2,176.5	$2,047.6	+ 8.6%	+14.3%
Furniture & bedding	24.1	21.4	19.5	18.9	+12.6	+27.5
% of total expenditures	1.0%	1.0%	0.9%	0.9%		

(p) preliminary

Source: U.S. Department of Commerce.

CONSUMER EXPENDITURES FOR FURNITURE

Household Expenditures

In April 1985, the Bureau of Labor Statistics (BLS) of the U.S. Department of Labor issued a report based on its 1980-81 Consumer Expenditure Survey, the first in a continuing survey. The report included information on household expenditures for furniture and all homefurnishings and equipment, averaged over a two-year period. Unlike the data on personal consumption expenditures compiled by the U.S. Census Bureau, the BLS surveys cover direct purchases by urban households only. Other acquisitions by the consumer unit (household) are not covered.

The BLS surveys show average annual expenditures per urban household in terms of various demographic considerations, such as the age of the householder, the household's income before taxes, and housing tenure (homeowner vs. renter). Projections made by Fairchild reveal the propensity of those in different classifications to make purchases. For example, expenditures on furniture were led by households whose head was in the 25-34 age group. They had a 31.7% share of these purchases, reflecting the tendency for new household formation in this group. These households acccounted for 23.6% of the total number of households. Homeowners represented 61.5% of the consumer units (households); 38.5% were renters. In purchasing furniture, however, homeowners accounted for a nearly 72% share vs. 28% for renters.

Spending for furniture in the BLS study included the following furniture types: living room, dining room, bedroom, nursery, and porch, and other outdoor furniture.

Urban Household Expenditures For Furniture, 1980-81 Average
By Age of Householder

	Total	Under 25	25-34	35-44	45-54	55-64	65 & Over
Number of consumer units (thous.)*	68,295	7,408	16,083	11,422	9,685	10,410	13,287
Percent of Total	100.0%	10.8	23.6	16.7	14.2	15.2	29.5
Average age of householder* (years)	46.2	21.6	29.5	39.2	49.5	59.3	73.6
Average size of household (persons)	2.7	1.8	2.8	3.8	3.4	2.4	1.7
Average household income after taxes	$17,483	$10,092	$18,222	$22,307	$24,474	$19,115	$10,162
Average expenditure per household:							
All homefurnishings & equipment	$ 711	$ 508	$ 837	$ 941	$ 865	$ 698	$ 372
Furniture	259	225	342	358	256	213	104

* A consumer unit is an urban household. The householder is the person who is the owner or renter of the premises at the time of the interview.

CONSUMER EXPENDITURES FOR FURNITURE

Household Expenditures

By Household Income Before Taxes

	Total	$30,000 & Over	$20,000 29,000	$15,000 19,999	$10,000 14,999	Under $10,000
Number of consumer units (thous.)	68,295	11,977	12,165	7,426	8,357	17,412
Percent of Total	100.0%*	17.5	17.8	10.9	12.2	25.5
Average age of householder* (years)	46.2	44.5	41.4	42.1	43.2	51.0
Average size of household (persons)	2.7	3.4	3.1	2.7	2.5	1.9
Average household income after taxes	$17,483	$37,468	$21,190	$15,654	$11,281	$ 4,904
Average expenditure per household:						
All homefurnishings & equipment	$ 711	$1,435	$ 828	$ 627	$ 491	$ 288
Furniture	254	513	286	228	177	93

* Total includes 10.9 thousand households for which income was not reported.

By Housing Tenure

	Total	Homeowner	Renter
Number of consumer units (thous.)	68,295	41,990	26,305
Percent of Total	100.0%	61.5	38.5
Average age of householder (years)	46.2	50.5	39.4
Average size of household (persons)	2.7	3.0	2.2
Average household income after taxes	$17,483	$21,307	$11,642
Average expenditure per household:			
All homefurnishings & equipment	$ 711	$ 877	$ 446
Furniture	254	296	187

Distribution of Projected Total Expenditures of Urban Households, 1980-81 Average
By Age of Householder, By Income & By Housing Tenure

	Total Home Furnishings & Equipment	Furniture
By age of householder:		
Total	100.0%	100.0%
Under 25	7.6	9.6
25-34	27.2	31.7
35-44	21.8	23.6
45-54	17.2	14.3
55-64	16.1	12.8
65 & over	10.1	8.0

(continued)

CONSUMER EXPENDITURES FOR FURNITURE

Household Expenditures

Distribution of Projected Total Expenditures of Urban Households, 1980-81 Average
(continued)

	Total Home Furnishings & Equipment	Furniture
By household income before taxes:		
Total	100.0%*	100.0%*
$30,000 & over	41.9	42.6
$20,000-29,999	24.5	24.1
$15,000-19,999	11.3	11.7
$10,000-14,999	9.9	10.2
Under $10,000	12.4	11.4
By housing tenure of householder:		
Total	100.0%	100.0%
Homeowner	75.8	71.6
Renter	24.2	28.4

* Total includes households for which income was not reported.

Source: Fairchild Market Research Division based on U.S. Bureau of Labor Statistics, Consumer Expenditure Survey 1980-81 Bulletin 2225, April 1985.

RETAIL SALES

Sales of furniture through retail outlets amounted to $23.2 billion in 1985, according to the American Furniture Manufacturers Association. The association's economic forecast looks for a 1986 total amounting to $25.4 billion, and a total of $27.7 billion in 1987.

RETAIL SALES BY STORE TYPE

A complete census of retail trade (as well as of manufactures and wholesaling) is compiled by the Census Bureau, U.S. Department of Commerce every five years. In this report, some comparisons (for store data) have been made between 1982 census results and those reported in 1977. However, as footnoted in the tables, comparisions are not exact because of a change in treatment of leased departments--which affects some types of merchandise more than others.

In 1977, leased department information was not separately reported, but was included as part of the data on the stores in which the leased departments were operated. In 1982, however, leased department operations were treated as separate establishments and classified according to the kind of business conducted. This change affects store counts and sales figures in some merchandise categories to a greater extent than others. The Census Bureau issued revised dollar volume figures for 1977 covering total store sales to be comparable with 1982, but no other revisions have been published by the Bureau.

RETAIL SALES BY STORE TYPE

In addition, 1977 census data covered both stores with paid employees and those with no payroll. In 1982, the census covered only retail operations with payroll. The Fairchild research department has adjusted 1977 figures where possible to exclude stores with no paid employees, in order to make the data comparable to 1982. However, no exact comparisons can be made for 1982 vs. 1977 on merchandise line sales by type of retail outlet. Total sales for 1982 in stores with payroll were reported as follows:

Total Homefurnishings Sales & Furniture & Bedding Sales Through Retail Outlets, 1982

(Includes only retail establishments with payroll)

		Sales	
	Establishments	Thous. $	Percent
Homefurnishings & equipment, reported classifications, total	--	$84,399,182	100.0
Furniture & bedding (sleep equipment)	67,720	19,086,032	22.6

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade, RC82-1-3

Furniture & Bedding Sales By Major Outlet Type, 1982

(In retail establishments with payroll)

	Establishments		Sales By Outlet Type	
	Number	Percent	Thous.$	Percent
Furniture & bedding, total	67,720	100.0	$19,086,032	100.0
General merchandise store group*	15,695	23.2	3,440,727	18.0
Department stores*	8,162	12.1	3,099,952	16.2
Furniture, homefurnishings stores	34,031	50.3	14,577,834	76.4
Furniture stores	29,609	43.7	14,095,074	73.9
Nonstore retailers:				
Mail order houses**	3,142	4.6	257,208	1.3
Other retailers	14,852	21.9	810,263	4.3

* Leased departments are not included in the stores in which operated, but are counted as separate establishments.

** Catalog order desks are included in the sales of the stores in which they are located.

Furniture stores are the major outlet for furniture and bedding, accounting for 73.9% of reported sales through retail outlets with payroll in 1982. Without adjustment for any possible effect of the change in treatment of leased departments, the 1977 census of retail trade showed furniture stores with payroll accounting for 73.5% of the total $14.7 billion in furniture and bedding sales that year. Department stores accounted for 16.2% of reported sales in 1982; 17.7% in 1977.

Furniture Stores

According to the 1982 census, 24,926 firms were operating 29,609 furniture stores with payroll that year. Furniture store (with payroll) sales that year totaled $17.2 billion, of which furniture and bedding represented 81.8%; major appliances, 4.8%; kitchenware/housewares, 4.0%; the remainder, 9.4%.

It is estimated that in 1977 there were 31,366 furniture stores with payroll (including leased departments), operated by about 27,344 firms and $13.6 billion in sales. While the number of furniture store firms and stores declined, sales (on a current dollar basis, without adjustment for inflation) were up 26.4% in 1982 compared with 1977. (In 1982, the consumer price index -- excluding food, energy and shelter -- was 44.9% higher than the comparable 1977 index).

Furniture store operations were much bigger in 1982, and control of a bigger share of furniture store business was centered in the larger operations. The number of furniture store firms with a volume of $5.0 million or more totaled 313 in 1982, compared with 208 of this size in 1977. Firms with a volume of $5.0 million or more accounted for 1.3% of the firms operating stores with payroll in 1982, 8.7% of the stores and had a 31.6% share of sales. (These figures are based on those operating the entire year--of which there were 23,898 in 1982 vs. 24,926 operating anytime in year). In 1977, firms with a volume of $5.0 million or more represented 0.8% of the firm total, operated 6.0% of the stores with payroll, and had a 25.4% share of sales.

The 20,586 furniture store firms with volume of less than $1.0 million in 1982--86.1% of the total in this classification (with payroll) -- operated about 75% of the stores, but had a share of only 36% of sales. In 1977, these smaller firms (91.6% of the total count) operated 83% of the stores and held a 47% share of sales.

Furniture Store Operations By Size of Firms: 1977, 1982
(Retail establishments with payroll)

	No. of Firms		Percent of Total					
			Firms		Stores		Sales	
	1982	1977(e)	1982	1977(e)	1982	1977(e)	1982	1977(e)
Total	23,898*	27,344	100.0	100.0	100.0	100.0	100.0	100.0
Annual sales of firms:								
$10.0 million or more	126	76	0.5	0.3	6.0	4.4	24.1	18.9
$ 5.0 mil. - $ 9.9 mil.	187	132	0.8	0.5	2.7	1.6	7.5	6.5
$ 1.0 mil. - $ 4.9 mil.	2,999	2,102	12.5	7.7	16.5	11.0	32.7	27.4
Less than $1 million	20,586	25,034	86.1	91.6	74.9	83.0	35.7	47.2

(e) estimated for comparability with 1982.

* Firms in operation the entire year. (24,926 firms were in operation anytime during the year).

Furniture Stores (continued)

Furniture store firms operating more than one store have increased in importance in recent years. Multi-unit operations of 10 or more stores increased their share of furniture store (with payroll) sales from less than 14% in 1977 to over 16% in 1982. Those operating two or more stores upped their share from less than 38% to over 45%.

Furniture Store Single & Multi-Unit Operations: 1977, 1982
(Retail establishments with payroll)

	Percent of Total					
	Firms		Stores		Sales	
	1982	1977	1982	1977	1982	1977
Total	100.0	100.0	100.0	100.0	100.0	100.0
Single-unit organizations	90.0	94.1	75.8	82.1	54.5	62.2
Multi-unit organizations	10.0	5.9	24.2	17.9	45.5	37.8
Operating: 2-4 stores	9.0	5.4	14.6	11.5	22.5	19.4
5-9 stores	0.7	0.3	3.8	2.1	6.9	4.7
10 or more stores	0.3	0.2	5.8	4.3	16.1	13.7
50 or more stores	*	*	2.3	1.9	7.2	6.4

* Less than 0.1%.

Concentration of Largest Furniture Store Firms: 1977, 1982
(Retail establishments with payroll)

	Stores	Sales (mil. $)	Percent of Sales			
			Stores		Sales	
	1982	1982	1982	1977	1982	1977
All firms*	26,609	$17,223.4	100.0	100.0	100.0	100.0
4 largest firms	187	875.4	0.6	0.5	5.1	5.5
8 largest firms	387	1,327.5	1.3	1.0	7.7	7.7
20 largest firms	696	2,122.2	2.4	2.6	12.3	11.7
50 largest firms	1,216	2,974.6	4.1	3.9	17.3	16.6

* Based on 24,926 firms in operation anytime during the year 1982.

Sales volume figures are reported for furniture stores with payroll in operation the entire year 1982 -- of which there were 28,372, with sales totaling $16.4 billion (out of the total of $17.2 billion reported for stores in operation anytime during the year).

Over half (54.9%) of furniture store (with payroll) sales in 1982 were concentrated among furniture stores with sales of $1.0 million or more -- 4,099 stores, or 14.4% of the total count. The 1977 census showed 9.9% of the stores with a volume of $1.0 million or more, and accounting for 44.5% of furniture store sales.

As previously noted, detailed 1982 census data on stores (and merchandise lines) is limited to retail establishments with payroll. In 1977, however, the census showed a total of 36,210 furniture stores in operation, of which 8,211 had no paid employees. While such stores represented 22.7% of the total store count, they accounted for only 2.7% of furniture store sales.

Furniture Stores (continued)

Furniture Stores (In Operation Entire Year) By Sales Size: 1977, 1982
(Retail establishments with payroll)

	1982		Percent of Total			
	Stores	Sales (mil. $)	Stores 1982	Stores 1977	Sales 1982	Sales 1977
Total	28,372	$16,416.3	100.0	100.0	100.0	100.0
Annual sales:						
$ 5.0 mil. or more	231	2,145.3	0.8	0.6	13.1	10.6
2.5 mil. -- $ 4.9 mil.	596	2,020.3	2.1	2.3	12.3	13.7
1.0 mil. -- $2.49	3,272	4,842.1	11.5	7.0	29.5	20.2
0.5 mil. -- $0.9	5,164	3,602.5	18.2	16.0	21.9	23.7
Under $500,000	19,109	3,806.1	67.4	74.1	23.2	31.8

Source: U.S. Bureau of the Census,
1982/1977 Census of Retail Trade.

Current information on total furniture store sales is published by the Census Bureau in the Monthly Retail Trade report series. These sales figures are estimates for all stores -- including those with payroll and those without paid employees. In County Business Patterns, the Bureau publishes estimates on an annual basis covering the number of stores with payroll. Unlike the 1982 census of retail trade figures, monthly retail trade reports on sales include leased departments sales within the stores in which operated (the lessor, adjusting 1982 for comparability, furniture store sales that year amounted to $17,658 million. These figures include both stores with and without payroll.)

Furniture Stores: Number of Stores & Total Sales

	1985(p)	1984	1983	% Change 1985/1984
Total sales (mil. $)	$23,358	$22,474	$19,700	+ 4.0%
Number of stores (with payroll)	na	na	30,510	na

(p) preliminary
na not available

Source: U.S. Bureau of the Census, Monthly Retail Trade;
Revised Monthly Retail Sales & Inventories BR-13-85;
County Business Patterns

Seasonal Pattern in Furniture Store Sales
Percent of Year's Sales By Months, 1984, 1985

Year	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1985	100.0%	7.4%	7.1%	8.0%	7.7%	8.4%	8.2%	8.1%	8.9%	8.2%	8.6%	9.4%	10.0%
1984	100.0	7.3	7.2	8.1	7.8	8.3	8.6	8.1	8.8	8.2	8.7	9.2	9.7

Source: Based U.S. Bureau of the Census Monthly Retail Trade reports.

Furniture Stores (continued)

The 25 Leading Furniture Stores, 1983, 1984

	Sales (Mil. $)			Number of Stores	Sales Per Square Foot
	1984	1983	% Change 1984/1983	1984	1984
1. Levitz	$761.7	$644.5	+ 18.2%	92	$157
2. Breuner's	215.0	185.0	+ 16.2	17	185
3. Haverty's	175.5	155.0	+ 13.2	65	128
4. Reliable	170.0	125.0	+ 36.0	25	na
5. W.S. Badcock	165.0	152.0	+ 8.6	205	82
6. Rhodes	129.4	100.4	+ 28.9	58	94
7. Wickes	126.0*	120.0*	+ 5.0	15	na
8. RB Furniture	124.0	120.0	+ 3.3	78	na
9. Nebraska Furn. Mart	115.0	105.0	+ 9.5	1	575
10. Heilig-Meyers	114.0	96.4	+ 18.3	101	na
11. Seaman's	100.0*	80.0	+ 25.0	na	na
12. Finger's	92.4*	88.0*	+ 5.0	na	na
13. Cousin's	89.3	34.5	+158.9	24	282
14. Scandinavian Design, Natick, Ma.	82.0	60.0	+ 36.7	50	341
15. McMahan's, Santa Monica	76.4*	72.8*	+ 4.9	na	na
16. Value City	75.0	68.0*	+ 10.3	30	na
17. Barrow's	71.7*	68.3*	+ 5.0	na	na
18. Huffman Koos	65.8*	62.7*	+ 4.9	na	na
19. McMahan's, Carlsbad, Ca.	61.9*	59.0*	+ 4.9	na	na
20. Barker Bros.	58.8*	56.0*	+ 5.0	na	na
21. Scandinavian Design, Evanston, Ill.	58.1	41.8	+ 39.0	71	na
22. Alpert's	57.7*	55.0*	+ 4.9	10	na
23. Haynes Furniture	50.0	40.3*	+ 24.1	4	141
24. Homemakers	50.0	50.0	--	5	185
25. Sterchi Bros.	48.2	45.2	+ 6.6	73	na

* estimate
na not available

Source: HFD - The Weekly Home Furnishings Newspaper, May 20, 1985

The Top 25 Sleep Shops, 1983

	Sales (Mil. $)	Number of Stores	
1. Sleepy's, New Hyde Park NY	$28.1	32	(5 of which are licensees)
2. Ortho Mattress, Ranch Dominquez, CA	27.0	72	
3. Kleinsleep, Yonkers, N.Y.	24.5	16	(4 are franchisees)
4. Mattress Warehouse, Akron, OH	23.0	43	(38 are franchisees)
5. Hillside Bedding, Mount Vernon, NY	22.5	56	(41 are franchisees)
6. Sleep Country, Dallas, TX	20.5	8	
7. American Bed Co., Houston, TX	19.7	28	

(continued)

The Top 25 Sleep Shops, 1983 (continued)

	Sales (Mil. $)	Number of Stores	
8. Mattress Discounters, Arlington, VA	17.0	36	
9. Slumberland, St. Paul, MN	16.0	16	(8 are franchisees)
10. City Mattress, Buffalo, NY	10.0*	12	
11. Bed City, Bronx, NY	14.0	28	
12. Royal Mattress, Atlanta, GA	14.0	8	
13. Sleep & Air, Hayward, CA	14.0*	31	(30 are franchisees)
14. Steven, Chicago, IL	13.0	20	
15. King Koil Bedquarters, St. Paul, MN	12.0	85	(all franchisees)
16. W. Simmons, Cerritos, GA	10.2	18	
17. Bedding Barn, Newington, CT	10.0*	13	
18. Bedding Liquidators, Indianapolis, IN	7.8	17	
19. Colony, Hackensack, NJ	7.0	7	
20. Sleep-O-Rama, Margate, FL	6.7	11	
21. Off-Track Bedding, East Providence, NJ	6.5	10	
22. Siesta, Stroughton, MA	4.7	14	
23. Sleep Quarters, Norfolk, VA	4.6	6	
24. Nationwide, Philadelphia, PA	4.5	9	
25. Sleep Station, St. Louis, MO	4.0	9	

* estimate

Source: HFD - The Weekly Home Furnishings Newspaper
June 18, 1984

Department Stores

Furniture and bedding sales were reported by 8,162 department stores in 1982 -- 81.8% of the total department store count that year. Sales amounted to $3.1 billion, which was 3.1% of total department store sales; 3.6% of sales of the 8,162 department stores selling furniture and bedding.

Within the department store furniture & bedding total, upholstered furniture represented 23.4% of sales; other living room, dining room, bedroom furniture, 25.3%; bedding (sleep furniture, mattresses, dual-purpose, etc.), 26%; all other furniture, 25.3%.

Department Stores (continued)

Department Store Sales of Furniture & Bedding, 1982

	Establishments*		Sales of specified merchandise lines		
				Percent of total sales of	
	Number	Percent	Sales (thous.$)	Estabs. selling the line	All Estabs.
Department stores, total	9,981	100.0	$99,170,163	—	100.0
Furniture & bedding	8,162	81.8	3,099,952	3.6	3.1
Upholstered furniture	3,367	33.7	726,878	1.4	0.7
Other living room, dining room, bedroom furniture	3,798	38.0	785,545	1.5	0.8
Bedding, sleep furniture, mattresses, etc.	3,725	37.3	808,595	1.5	0.8
All other furniture	6,954	69.7	782,934	1.1	0.8

* Each store location is separately counted as an "establishment". Department stores include both traditional department stores and discount department stores which meet the definition of this store type under the Standard Industrial Classification (SIC) system. Department stores operated by mail order chains (such as Sears) are included in the above table. (By definition, all department stores have 25 or more paid employees).

Overall, department store business has become incresingly concentrated among larger firms, operating a number of stores. In 1982, there were 502 department store firms -- that is, companies such as Federated, Dayton Hudson, R.H. Macy, etc. -- operating 9,981 department stores (including discount department stores, etc., a noted above). The count on firms should be clearly distinguished from individual companies or divisions operating by these firms, which control the buying for their stores -- such as Bloomingdale's New York, a division of Federated Department stores. Counts at the divisional level are not available through census reports.

FOR DETAILED INFORMATION ON DEPARTMENT STORES, AS WELL AS OTHER STORE TYPES BASED ON THE 1982 CENSUS OF RETAIL TRADE, SEE THE FACT FILE: A Statistical Analysis of Retailing (1985), and Sales of Major Classifications of Consumer Goods By Retail Outlet Type (1986).

RETAIL SALES BY STORE TYPE

Department Stores

The 25 Leading Department Stores in Furniture Sales, 1983, 1984

	Furniture Sales (Mil. $)			Branches Carrying Furniture (No.)
	1984	1983	% Change 1984/1983	1984
1. Macy's New York	$71.1*	$69.4*	+ 2.4%	9
2. Bambergers	68.9	67.2*	+ 2.5	16
3. Macy's California	56.4*	55.0*	+ 2.5	16
4. Bloomingdale's	54.0*	49.0*	+10.2	15
5. Abraham & Straus	50.2*	49.0	+ 2.4	13
6. The Broadway	50.0	40.0*	+25.0	40
7. Marshall Field	45.0	36.0	+25.0	15
8. Burdines	44.1*	43.0	+ 2.5	18
9. Jordan Marsh Boston	38.4*	37.5*	+ 2.4	12
10. Foley's	38.3*	37.4*	+ 2.4	14
11. Hudson's	37.2*	29.0*	+28.3	17
12. Rich's	37.0	30.0*	+23.3	14
13. May Co., California	36.9*	36.0*	+ 2.5	30
14. Dayton's	32.0*	26.0*	+23.1	6
15. The Bon	30.8*	30.0	+ 2.7	na
16. Hecht's	30.8*	30.0	+ 2.7	20
17. Emporium Capwell	30.0*	25.6*	+17.2	21
18. Gimbel's East	28.7*	28.0*	+ 2.5	15
19. Robinson's	28.5*	28.5*	--	17
20. Woodward & Lothrop	26.2*	25.6	+ 2.3	15
21. Carson Pirie Scott	26.0*	16.0	+62.5	13
22. Maas Bros.	25.2*	24.6*	+ 2.4	15
23. Bullock's	24.1*	23.5*	+ 2.6	20
24. Famous Barr	23.6*	23.0	+ 2.6	15
25. Lazarus	22.7*	22.1	+ 2.7	10

* estimated
na not available

Source: HFD - The Weekly Home Furnishings Newspaper
May 20, 1985

Selected 1984 Merchandising & Operating Results in Furniture & Bedding Departments in Department Stores with Sales Over $1 Million
(Median Results)

	Furniture & Bedding Total (69)*	Upholstered Furniture (53)*	Case Goods (37)*	Dual-Sleep Bedding & Other Sleep Furniture (59)*	All Other Furniture (27)
Net sales, % change from last year	+ 8.8%	+ 8.9%	+ 10.6%	+ 5.2%	+ 19.1%
Sales, % of merchandising divison**	48.0	17.6	9.4	15.4	7.0
Sales, % of total store	4.5	1.8	0.9	1.5	0.7
Cumulative markon, %	46.3	46.8	47.6	46.0	49.1
Gross margin, % of net sales	39.5	40.2	38.9	41.2	40.6
Markdowns, % of net sales	13.1	13.2	15.5	10.1	14.7
$ sales per sq. ft. of selling space (main or largest selling unit)	$ 61.0	$ 50.7	$ 47.4	$ 102.1	$ 32.2
Number of stock turns (times)	2.2	2.2	1.5	4.0	1.4

(footnotes continued)

RETAIL SALES BY STORE TYPE

(footnotes from preceding table)

* Number in parentheses represents the number of reporting companies in each category.
** Merchandise division for furniture & bedding is furniture & decorative accessories.

Source: National Retail Merchants Association,
Merchandising & Operating Results 1985 Edition

CONSUMER PRICE INDEX

Consumer Price Indexes for Specified Furniture & Bedding Items 1983-1985

(1967 = 100 unless otherwise specified)

	Annual Averages			% Change	
	1985	1984	1983	1985/1984	1984/1983
All items	321.7	307.6	297.4	+ 4.6%	+ 3.4%
Furniture & bedding	228.5	219.5	215.3	+ 4.1	+ 2.0
Bedroom furniture (1977=100)	160.6	150.9	148.2	+ 6.4	+ 1.8
Sofas (Dec. 1977 = 100)	122.5	120.9	118.6	+ 1.3	+ 1.9
Living room chairs & tables (Dec. 1977=100)	127.7	127.2	124.6	+ 0.4	+ 2.1
Other furniture (Dec. 1977=100)	147.8	139.7	137.1	+ 5.8	+ 1.9

(p) preliminary

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

RETAIL ADVERTISING

Percent of Year's Total Newspaper Advertising Linage Done By Retailers Each Month, 1984

Month	Bedroom Sets	Dinette Sets	Dining Room Sets	Living Room Sets	Living Room Chairs	Mattresses	Sofabeds Sofas & Sectionals
January	7.9%	6.9%	7.6%	5.9%	8.7%	9.1%	8.1%
February	10.0	9.2	9.4	6.3	8.9	7.6	8.2
March	10.4	7.3	7.5	8.3	8.4	9.2	9.2
April	8.1	8.6	7.8	2.9	7.3	8.7	8.2
May	7.3	6.9	8.7	6.1	9.3	8.2	7.6
June	7.2	6.6	8.4	6.9	8.9	8.3	7.0
July	8.2	6.7	8.4	6.6	9.1	8.1	8.1
August	9.9	8.9	6.8	7.1	8.8	8.0	10.4
September	9.2	13.6	8.0	10.9	8.3	10.5	10.5
October	7.2	6.8	9.6	10.5	7.1	6.8	7.7
November	7.5	10.7	11.1	14.4	7.0	9.2	9.1
December	7.1	7.8	6.7	14.1	8.2	6.3	5.9

Source: The Advertising Checking Bureau, Inc.;
Newspaper Advertising Bureau, Inc.

CONSUMER BUYING HABITS

Of the 416 consumers polled in the May 1985 HFD/Better Homes & Gardens annual survey, 65.4% believed that information on furniture care would be most helpful while shopping for furniture; 64.7% said pictures of different room setting would be most helpful. Three out of four respondents shopped stores to get ideas and 60% watched local newspapers for sales.

Bedding

Sales & Type of Mattress/Box Spring Currently Owned

Size	
Total respondents	100.0%
Full/double	41.3
Queen	31.0
King	19.0
Twin	6.0
Other	1.0
No answer	1.7

Type	
Total respondents	100.0%
Innerspring	77.2
Waterbed	9.1
Foam	6.5
Other	0.7
No answer	6.7

Sales & Type of Mattress/Box Spring Panel Members Would Most Likely Buy

Size	
Total respondents	100.0%
Queen	43.2
Full/double	27.2
King	21.4
Twin	6.0
Other	0.5
Don't know/no answer	1.7

Type	
Total respondents	100.0%
Innerspring	66.6
Waterbed	18.5
Foam	6.5
Other	0.7
Don't know/no answer	7.7

Primary Reason For Purchase of Last Mattress

Total respondents*	100.0%
Replacement	51.7
First purchase	15.9
Wanted larger mattress	14.4
Backache	12.7
Moved to a new home	6.7
Needed additional mattress for a second home	4.3
No answer	1.7

* Columns add to more than 100.0% due to multiple responses

CONSUMER BUYING HABITS

The 1985 HFD/Better Homes & Gardens survey indicates that a la carte pieces are popular in the living room, shoppers still prefer suites in the dining room and master bedroom, for combined living/dining areas, they want smaller scale furniture.

Furniture

	Furniture Composition Prepared		
	Matched Suites of Furniture	Individual Pieces	No Answer
Living room	43.0%	56.5%	0.5%
Dining room	87.5	11.1	1.4
Master bedroom	81.0	18.5	0.5
Other bedroom	43.3	52.9	3.8
Family room	16.1	80.3	3.6
Porch or deck	43.0	53.2	3.8
Lawn or poolside	36.5	54.1	9.4
Foyer	13.7	74.8	11.5

Types of Small Scale Furniture Panel Members would like to See

	% of respondents*
Wall storage systems	46.2%
Upholstered chairs	38.5
Dining room furniture (buffets, hutches, etc.)	33.9
End tables/occasional tables	32.9
Chests of drawers	29.3
Sofas	28.8
Coffee/cocktail tables	21.6
Dining room tables	19.2
Beds	12.0
Grandfather clocks	11.1
Other	1.4
Don't know/no answer	21.6

* Total does not add to 100.0% due to multiple responses.

Source: HFD - The Weekly Home Furnishings Newspaper
December 16, 1985

In an earlier (1984) HFD/Better Homes & Gardens survey, 423 panel members reported on styles of furniture preferred for their homes. Nearly half of the respondents stated that they preferred country (casual) while about four out of ten cited traditional.

CONSUMER BUYING HABITS

HFD/Better Homes & Gardens Survey, May 1985 (continued)

Style of Furniture Preferred by Panel Members

Total respondents	100.0%
Country (casual)	48.7
Traditional	37.6
Eclectic (mixture)	27.2
Modern (contemporary)	26.5
Early American	23.9
Turn-of-the-century American	9.7
French provincial	7.8
Formal English/French	7.1
Oriental	5.9
Mediterranian/Spanish	5.7
Italian Provincial	4.3
Antique	3.8

Rooms Consumer Panel Members are Planning to Decorate/Redecorate

Total respondents	100.0%
Living room	47.0
Master Bedroom	38.9
Other bedrooms	34.6
Bathroom	34.0
Kitchen/breakfast area	30.1
Dining room	25.9
Family room	25.6
Porch/patio	15.7
New House	0.9
Other	6.3
Don't know/no answer	1.2

Rooms Consumer Panel Member Expect to Spend the Most On

Total respondents	100.0%
Living room	73.5
Family Room	16.8
Master bedroom	7.1
Dining room	6.6
Other bedrooms	0.2
Other	0.2
Don't know/no answer	0.9

Source: HFD - The Weekly Home Furnishings Newspaper
November 26, 1984

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now--1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumber buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S.mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change. For orders and further information, please write to:

FAIRCHILD FACT FILES,
Fairchild Books,
7 East 12th Street, New York, N.Y. 10003

C 3400-1.86-4

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

Toiletries, Cosmetics, Fragrances, and Beauty Aids

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst
Kenneth Greenman, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

TABLE OF CONTENTS

Page

MARKET TRENDS.. 1

AT THE MANUFACTURER LEVEL:
  GENERAL INDUSTRY STATISTICS.. 2
    EMPLOYMENT & EARNINGS.. 4
    CONCENTRATION IN THE INDUSTRY.................................... 5
    LOCATION IN THE INDUSTRY... 6
  LEADING MANUFACTURERS.. 6
  PRODUCTION LEVELS.. 8
  PRODUCT SHIPMENTS.. 9
  FOREIGN TRADE..11
  PRODUCER PRICE INDEX...12
  ADVERTISING EXPENDITURES...13

AT THE RETAIL LEVEL:
  THE POTENTIAL MARKET...14
  CONSUMER EXPENDITURES..16
  RETAIL SALES BY OUTLET TYPE..21
  RETAIL SALES BY METRO MARKET.......................................25
  CONSUMER PRICES..25
  CONSUMER BUYING HABITS...26

SCHEDULE OF ADDITIONAL FACT FILES....................................35

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publication sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1985 by Fairchild Publications,
Division of Capital Cities Media, Inc.

All Rights Reserved

Standard Book Number: 87005-550-X

Printed in the United States of America

TOILETRIES, COSMETICS, FRAGRANCES & BEAUTY AIDS

Market Trends

The toiletries and cosmetics industry is clearly in a state of flux. The 1980's, thus far, have shown that the industry is not recession-proof as once thought in some quarters. It is also the decade in which changing demographics have created both problems and new opportunties for an industry that is striving to stay current under difficult circumstances.

It remains a fashion-oriented, youth-centered business with the majority of its customers still women. However, the slowing population growth, the aging of the population, and the growth of minorities has led to increased market segmentation. Expenditures for advertising and research and development have increased substantially as the number of new product launches has made a competitive industry even more competitive.

The prime consumers of cosmetics are women aged 18 to 24. After peaking in 1980, this population group has begun to decline in number. By 1990, it will be 15% smaller and this trend will not reverse itself until about 1997 when the children of the baby boomers come of age. The fact that the baby boom generation is aging has prompted the industry to shift gears and emphasize skincare and treatment products designed to maintain a youthful complexion. The over-50 age group, though a smaller market, has a great deal of discretionary income and it, too, is receiving particular attention by marketers of hundreds of anti-aging skincare items, ranging from moisturizers to eye cream, including complex, multi-step regimens.

Skincare sales are expected to grow by as much as 13% in 1986, making it a very hot growth category. Products retail at a broad array of price points, from Richardson-Vicks' Oil of Olay lotion (less than $5 for a 3.5 oz. bottle) to Alfin Fragrances' Glycel ($195 for an introductory kit). Co-developed by noted heart surgeon Christiaan Barnard, Glycel—like other quasi-medical skin products—is arousing controversy as to its effectiveness. Since the medical claims of such products stop just short of crossing the line from cosmetic to drug, the Food and Drug Administration does not require the rigorous testing that a "drug" would entail.

Another rapidly growing sector for the industry is the marketing of ethnic products, with total health and beauty aid sales of $2.3 billion in 1985. Blacks are a promising target -- the black market is growing much faster than the white, and it is a much younger market. They reportedly spend two to three times as much as whites on hair and skin products. As more blacks, women in particular, enter the job market, their need for grooming aids increases, and they will then have more household income to spend on these products.

Other product categories that did well in 1985, and are expected to continue expanding in 1986, are suntan products and haircare products. Warnings by the government about the dangers of too much sun have compelled an increasingly health-conscious population into using suntan/sunscreen items. The haircare segment has been buoyed by the success of mousse, considered by some to be the first true innovative product launched by the industry in years.

Fragrance sales, adjusted for inflation, have been flat for several years. The Giorgio and Obsession success stories prompted a re-evaluation by other manufacturers. Their success has validated for many a quick-impact, limited-distribution campaign. Some say that their use of scent-strip inserts revolutionized fragrance advertising by getting samples into the hands of a whole new customer who had not been buying fragrances in a specialty store.

Market Trends (continued)

The proliferation of new fragrance product introductions, spurred by the declining average market life of a new fragrance to about three years, are expanding the overall market but making shares smaller. The price of obtaining the customer, as exemplified by the $15 million launch of Obsession, has gone up dramatically. There is less time to build a profitable following and this puts pressure on manufacturers to maintain their product's prestige while getting the volume.

Cosmetic manufacturers of skincare products targeted at men have had an increasing impact educating men as to the benefits of cleansing and protecting their skin, something that women have been educated in for years. Some liken the men's market to a sleeping giant, one that can be awakened through aggressive point-of-purchase sampling, men's skincare consultations in stores, and educational advertising explaining product benefits. One example of this growing trend is the new line of men's toiletry products to be launched nationally this summer under the Adidas brand name by Beecham Products. This product line, which includes aftershave lotion and moisturizer, deodorant, soap, shampoo, and eau de toilette, marks Adidas' initial attempt in branding products outside the sports and clothing area.

GENERAL INDUSTRY STATISTICS

The entire complex of suppliers and product developers involved in the output of products in the toiletries, cosmetics, fragrances and beauty aids classification, including those producing components, those involved in repackaging operations, etc., is much broader than the official industry classifications (perfumes, cosmetics and other toilet preparations (Standard Industrial Classification 2844)), and includes some 800 to 1,000 manufacturers. This Fact File, is however, focused on end-products, manufactured by some 500 companies with industry shipments valued at $12.8 billion in 1985, according to estimates compiled by the International Trade Administration.

An annual survey of manufactures, covering a sample of manufacturers, is compiled each year in the interim between the complete census of manufactures conducted by the U.S. Census Bureau every five years (the latest of which covered operations in the year 1982). The surveys provide (for intercensal years) the key measures of manufacturing activity for important industries, and the data are adjusted to be comparable with 1982 census findings.

According to the 1982 census, 596 companies operating 639 plants were classified in the toilet preparations industry (SIC 2844), down from 644 companies operating 693 plants in 1977. Industry shipments, on a current dollar basis, increased 55.3% in 1982 compared with 1977, reaching a total of $10.2 billion. In 1983, according to the annual survey, industry shipments rose 7.3%, reaching over $10.9 billion. Capital expenditures were up 11.2% in 1983.

GENERAL INDUSTRY STATISTICS

Perfumes, Cosmetics & Toilet Preparations Industry (SIC 2844*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	596	644	--
Number of establishments	645**	639	693	+ 0.9%
Number with 20 or more employees	252	257	192	- 1.9
Payroll (mil. $)	$ 1,142.5	$ 1,102.1	$ 627.9	+ 3.7
Value added by manufacture# (mil. $)	$ 7,603.0	$ 7,124.4	$4,526.7	+ 6.7
Value of industry shipments## (mil. $)	$10,925.1	$10,183.2	$6,557.2	+ 7.3
Capital expenditures, new (mil. $)	$ 245.4	$ 220.7	$ 105.6	+11.2

na not available

* Standard Industrial Classification (SIC) 2844. Covers establishments primarily engaged in manufacturing perfumes, cosmetics and toilet preparations. It also includes establishments primarily engaged in blending and compounding perfume bases and those manufacturing shampoos and shaving products, whether from soap or synthetic detergents.

** Includes establishments with payroll, as reported in County Business Patterns (U.S. Bureau of the Census.)

# Value added by manufacture is derived by subtracting the cost of materials, fuel, etc., from the value of shipments and other receipts, with adjustments for finished and work-in-process inventories. It avoids the duplication in evaluating shipments which results from the use of products of some manufacturing establishments as materials by others, and is, for most purposes, the best measure of individual industries.

## Industry shipments include both products described as primary to the industry, as well as secondary products and miscellaneous receipts. The amounts shown as value of shipments for each industry and for individual products or classes of products are the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. For value of shipments of specific toilet preparations made by all manufacturers, including those making them as secondary products, see the section on PRODUCT SHIPMENTS. (Product shipments in 1985 were estimated at $13.2 billion).

Source: U.S. Bureau of the Census:
1983 Annual Survey of Manufactures,
1982, 1977 Census of Manufactures

Industry Trends

Based on the Census Bureau's 1983 annual survey of manufactures, the International Trade Administration has compiled estimates on the value of industry shipments in 1984 and 1985, in terms of both current and constant dollars, and a forecast for 1986 (constant dollar basis). Data has also been compiled by the ITA on trends in imports and exports. These estimates are summarized in the following table.

GENERAL INDUSTRY STATISTICS

Industry Trends (continued)

Perfumes, Cosmetics & Toilet Preparations Industry Trends, 1983-1986
(Values in millions of dollars)

	1983	1984(e)	1985(e)	Percent Change 1985/84	Forecast 1986/85
Value of industry shipments:					
Current $	$10,925	$11,465	$12,780	+ 11.5	--
Constant (1982) $	10,505	10,836	11,171	+ 3.1	+ 2.8
Value of imports (current $)	172	282	313	+ 10.8	+27.8
Import/new supply ratio*	0.016	0.024	0.024	- 0.5	--
Value of exports (current $)	328	331	309	- 6.5	- 6.1
Export/shipments ratio	0.029	0.028	0.023	- 16.1	--

(e) estimated

* New supply is the sum of product shipments (not industry shipments) plus imports.

Source: U.S. Department of Commerce:
Bureau of the Census and International Trade Administration

Employment & Earnings

In 1985, 67.6 million persons were employed in the toilet goods industry, a gain of 8.0% from 1983. The rate of growth for production workers (about two-thirds of industry employees) was even larger, a gain of 11.3% from 1983 to 1985. The size in production workers' average weekly earnings exceeded the rate of inflation in 1985, despite a moderate decline in the number of hours worked, according to the U.S. Bureau of Labor Statistics.

In 1975, the industry had about 48 million employees, including 30.4 million production workers.

Employment & Earnings in the Perfumes, Cosmetics & Toilet Preparations Industry: 1983-1985

	Annual Averages 1985(p)	1984	1983	% Change 1985/84
All employees (thous.)	67.6	66.8	62.6	+ 1.2%
Production workers (thous.)	46.0	45.3	41.3	+ 1.5
Average weekly earnings	$336.65	$321.14	$313.22	+ 4.8
Average hourly earnings	$ 8.61	$ 8.13	$ 7.85	+ 5.9
Average weekly hours	39.1	39.5	39.9	- 1.0

(p) preliminary

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Number of Manufacturing Plants in the Perfumes, Cosmetics & Toiletry Goods By Employment Size, 1983

	Establishments		Total Employees	
	Number	Percent	Number	Percent
Number of plants, total	645	100.0%	58,528	100.0%
By employment size:				
Under 10 employees	306	47.4	1,005	1.7
10-49 employees	185	28.7	4,292	7.3
50-99 employees	43	6.7	2,916	5.0
100-499 employees	74	11.5	17,700	30.2
500 or more employees	37	5.7	32,615	55.7

Source: U.S. Bureau of the Census,
County Business Patterns 1983

The Toilet Preparations Industry By Employment Size, 1982

	Establishments		Value Added By Manufacture		Industry Shipments	
	Number	Percent	Mil. $	Percent	Mil. $	Percent
Toilet preparations, total	639	100.0%	$7,124.4	100.0%	$10,183.2	100.0%
By establishment size-- Number of employees:						
10 - 19	382	59.8	149.9	2.1	226.0	2.2
20 - 49	101	15.8	185.8	2.6	299.5	2.9
50 - 99	48	7.5	209.0	2.9	377.8	3.7
100 - 249	38	5.9	383.2	5.4	649.5	6.4
250 - 499	33	5.2	1,688.5	23.7	2,465.7	24.2
500 or more	37	5.8	4,508.1	63.3	6,164.7	60.5

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
MC82-I-28D

According to the 1982 census of manufactures, of the 596 companies classified in the toilet preparations industry (SIC 2844), 102 were multi-unit companies, operating 145 plants (out of a total of 639). These companies accounted for 79.1% of total employment in the industry, 89.6% of value added by manufacture within the industry, and 88.6% of industry shipments.

Further information on concentration within the industry, based on the census, will be released by the Census Bureau at a later date. The previous census (1977) showed that the four largest companies accounted for 38% of the value of industry shipments; the eight largest accounted for 53%.

GENERAL INDUSTRY STATISTICS

Location of the Industry

The most recent census of manufactures (1982) shows that New Jersey has retained its preeminent position in industry shipments from the prior census five years earlier (1977). The top four states represent 52.9% of total shipments.

California has surpassed New York as the state with the most plants manufacturing toilet goods with 115 establishments, an 18% share. In 1977, California had 16.5% of the plants while New York had 19.5%. The top four states accounted for 55.3% of all plants in 1982.

Leading States in the Manufacture of Toiletry Goods, 1982

	Value of Industry Shipments		Establishments	
	Mil. $	% of Total	Number	% of Total
Industry shipments, U.S. total	$10,183.2	100.0	639	100.0
Leading states:				
New Jersey	2,154.7	21.2	82	12.8
New York	1,437.6	14.1	114	17.8
Illinois	1,244.8	12.2	43	6.7
California	549.7	5.4	115	18.0

Source: U.S. Bureau of the Census, 1982 Census of Manufactures

LEADING MANUFACTURERS

Manufacturers in the beauty industry experienced flat sales (after adjusting for price increases), during the first half of the 1980's. The industry has rebounded lately, after shaking off the effects of a national recession and price increases that forced many consumers to scale back their health and beauty aid purchases.

The market today is extremely competitive, as marketers pursue segmentation strategies to counter the declining population growth of its prime consumers. A wave of mergers and acquisitions has made the entrance into markets increasingly expensive. Large upfront investments in research, development, and advertising, as well as a high level of secrecy in the launching of new products, are now standard elements of the industry.

LEADING MANUFACTURERS

Total Sales and Profits of Leading Cosmetic Manufacturers, 1984
(Sales in millions of dollars)

	Sales*	Profits*	Percent of Total in Personal Care Segment** Sales	Profits
Avon Products	$ 3,143	$ 182	58%	59%
Beecham Group	2,839	380	na	na
Revlon Inc.	2,399	112	45	33
Schering-Plough Corp.	1,874	177	43	37
Chesebrough-Pond's	1,857	120	43	51
Cosmair Inc.	665	na	#	#
Noxell Corp.	350	28	#	#

* Worldwide
** Personal care products include many non-cosmetic/fragrance health and beauty aid products.
# Virtually 100%
na not available

Source: Forbes: The Forbes 500, 1985 and "38th Annual Report on American Industry (January 13, 1986); Advertising Age: 100 Leading National Advertisers (September 26, 1985)

Avon Products is the nation's largest cosmetic and fragrance company, with about $900 million in U.S. sales in these segments for 1984. Revlon's U.S. cosmetics and fragrance sales of $798 million placed it second, followed by Cosmair with sales of $665 million. Avon has had declining sales for a number of years, as the proliferation of women in the work force has left fewer at home for Avon sales representatives to service. Avon has now trained its representatives to sell unobtrusively at the work place. In addition, direct mail catalogs and direct response advertising on television through a toll-free number have been emphasized to broaden the company's market. The company holds about 25% of the mass scent fragrance market (colognes that sell for up to $20-per-oz.). Its flat sales in this area have prompted Avon to venture into the prestige fragrance market with its February 1986 launch of a $150-per-oz. fragrance called Deneuve.

Revlon gained market share for the first time in many years in the cosmetics market. Its facial makeup rose to 6.4% of the supermarket dollar share in 1985, third in volume after Maybelline. Revlon is also third in eye makeup, holding a 5% market share for mascara, 5.5% for eyeliner and 4.8% for eye shadow. Its Natural Wonder lipstick is fourth, trailing No. 1 Noxell's Cover Girl, with 10.2% of the supermarket dollar share. Revlon nail polish is fourth with a 7.9% share.

In the acne preparation category, Revlon's Oxy-5 overtook Richardson-Vick's Clearasil for the first time to claim the top spot with a 21.3% share of the market. Following a bitter battle with Revlon management, the company was taken over by Pantry Pride in November 1985. Pantry Pride then changed its name to Revlon Group, Inc.

LEADING MANUFACTURERS

Privately-held Cosmair is the U.S. licensee for L'Oreal and Lancome. These two divisions offer cosmetic lines that are challenging makeup competitors Maybelline, Noxell, and Revlon. In haircare products, Cosmair's mousse line is No. 1, though its lead is declining due to an abundance of competitive launches. L'Oreal is trying to cut into the lead of Bristol-Myers' Clairol in the hair coloring category -- in 1985, it introduced its semi-permanent Avantage hair coloring lotion. About one-third of Cosmair's total sales are from fragrances, thanks to the company's acquisition of Warner Cosmetics, which includes Lauren and Vanderbilt fragrance lines.

Chesebrough-Pond's introduced several extensions of established lines in 1984, including Cutex lipsticks, Vaseline Lip Therapy petroleum jelly and Q-tip cosmetic applicators. Chesebrough's Vaseline Intensive Care led the $500 million hand-and-body moisturizer category with a 19% share in dollars. The No. 2 market brand was American Brands' Jergens with an 11% share, followed by Westwood Pharamaceutical's Keri lotion at 8.4% and Warner-Lambert's Lubriderm at 5%.

Noxell's Cover Girl brand continued to benefit from the surge in lower-priced cosmetics sales in supermarkets. Its eyeliner leads with 35% of the supermarket dollar share. Its mascara, eye-shadow, and lipstick are all second behind Schering-Plough's Maybelline. Noxell's Noxzema is the No. 2 brand in the facial segment of the hand-and-body moisturizer market, after Richardson-Vicks' Oil of Olay.

Maybelline remains the market leader in the mass-market cosmetic category. It used the largest advertising budget in its history to introduce products such as its Long Wearing line of lipsticks and foundation makeup and the Shine Free Oil Control line of makeup. Another dominant Schering-Plough product group -- its Coppertone suncare line -- has maintained its lead. Schering's launch of Shade, a line of sunscreen products, is positioned against Johnson & Johnson's Sundown sunscreens in a segment growing at 20% annually.

Beecham, the British pharmaceutical and consumer products company, has expanded its penetration of the U.S. fragrance market with its acquisition of Germaine Monteil. Beecham has placed its Diane Von Furstenberg and Lancaster fragrance lines under the now reorganized Germaine Monteil division. Beecham's Jovan line holds the top spot in the $100 million musk segment of the fragrance market with a 54% share. Pfizer's Coty is next with a 24% share.

PRODUCTION LEVELS

The Federal Reserve Board indexes of production measure the overall level of physical output for U.S. industries with the year 1977 equal to 100. Production indexes for soaps and toiletries in 1985 greatly exceeded the level for all consumer goods and recorded a 12.1% increase over 1984. The production index for all consumer goods rose only 2.1% for the year, according to the FRB.

PRODUCTION LEVELS

Industrial Production Indexes, 1980-1985
(1977 = 100)

	1985	1984	1983	1982	1981	1980
Total industrial production	124.5	121.8	109.2	103.1	111.0	108.6
All consumer goods	120.7	118.2	109.3	101.4	104.1	102.7
Soaps & toiletries	175.6	156.7	139.9	125.4	129.6	121.5

Source: Board of Governors,
Federal Reserve System (G12.3)

Capacity Utilization Rates

The U.S. Bureau of the Census conducts an annual survey of plant capacity which covers operations in the fourth quarter of the year. Measures on capacity utilization include a rate which is based on plant operators' preferred level of operations, i.e. generally considered to be the rate at which profits will be maximized.

Capacity Utilization Rates in the Toilet Preparations Industry Fourth Quarters 1981-1984

	Preferred Rate			
	1984	1983	1982	1981
Toilet preparations	73	68	66	77

Source: U.S. Bureau of the Census, Current Industrial Reports,
Survey of Plant Capacity, 1984 (MQC1(84)1)

PRODUCT SHIPMENTS

The value of shipments of toilet goods (cosmetics, fragrances, and toiletries) by all U.S. producers, including manufacturers making them as secondary products, was estimated at $13.2 billion in 1985 by the International Trade Administration (Department of Commerce). This represents an increase in volume of 11.4% from their 1984 estimate of $11.8 billion. In constant dollars, discounting the effect of inflation, product shipments rose 3.2% for the year and at a compound annual growth rate of 0.5% from 1977-1982. Over this 5-year period, shipments on a current dollar basis rose at a compound annual growth rate of 10.3%.

Data on the value of shipments of individual product categories is also provided by the U.S. Bureau of Census through the 1983 annual survey of manufactures, as follows.

PRODUCT SHIPMENTS

Value of Major Product Classifications Shipped By All U.S. Producers 1982, 1983
(Millions of dollars)

	1983	1982	% Change 1983/82
Toilet preparations, total	$10,020.4	$ 9,258.2	+ 8.2%
Shaving preparations	351.3	328.7	+ 6.9
Perfumes, toilet water & colognes (men's & women's)	1,732.3	1,634.1	+ 6.0
Hair preparations, incl. shampoos	2,558.7	2,430.0	+ 5.3
Other cosmetics & toilet preparations	4,760.3	4,266.5	+11.6
Toilet preparations, n.s.k.	617.9	588.9	+ 3.2

n.s.k. not specified by kind.

Source: U.S. Bureau of the Census
Annual Survey of Manufactures, 1983

Information on product shipments in greater detail is reported by the Census Bureau based on the complete census of manufactures covering 1982 operations. Information from this source is compared with the previous census, covering 1977.

Product Shipments: Toilet Preparations, 1977, 1982
(Value of shipments in millions of dollars)

	1982		1977	
	No. of companies with shipments of $100,000 or more	Value of Shipments	No. of companies with shipments of $100,000 or more	Value of Shipments
Toilet preparations, total	na	$10,437.1	na	$ 6,393.5
Shaving preparations	na	328.7	na	268.2
Perfumes, toilet water, and colognes	na	1,634.1	na	1,096.3
Perfumes	69	552.2	58	364.3
Toilet waters	23	322.6	48	719.0
Colognes	40	750.4		
Hair preparations (including shampoos)	na	2,430.0	na	1,474.9
Shampoos	127	949.0	103	na
Hair sprays	56	392.9	40	256.2
Dentrifices, including mouthwashes, gargles, and rinses	na	1,178.9	na	659.6
Toothpaste, including aerosols and tooth powder	18	744.6	13	451.8
Mouthwashes and rinses	16	158.3	12	100.1
Other cosmetics and toilet preparations	na	4,266.5	na	2,597.4
Suntan and sunscreens, including oils	22	96.1	17	63.2
Hand lotions	44	206.8	35	161.3
Lip preparations (lipstick, lip gloss)	34	395.5	34	203.3
Eye preparations (mascara, eye shadow, eye liners, eye creams, etc.)	33	499.0	31	242.5
Deodorants	62	773.2	56	547.8

na not available

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982 MC82-I-28D

PRODUCT SHIPMENTS

In 1984 and 1985, the total skincare preparation market, which includes facial creams, powders and suncare lotions, was one of the fastest growing sectors of the toilet goods industry. It totaled $2.3 billion at the manufacturer level in 1984, a 9.5% increase from the year before, according to data from Charles Kline & Co.

Value of Shipments of Selected Toilet Goods, 1983, 1984
(Billions of dollars)

	1984	1983
Skincare preparations	$ 2.3	$ 2.1
Treatment products	1.1	1.0
Fragrances	2.2	2.0
Cosmetics	1.8	1.7
Nailcare	0.4	0.3
Toiletries	2.2	1.6
Haircare	2.6	2.4

Source: Charles Kline & Co., Fairfield, N.J.

FOREIGN TRADE

Imports of toilet goods exceeded exports for the first time in recent history in 1985. The value of imports rose to an estimated $313 million in 1985, up 10.8% from the year before. The value of exports fell 6.5% for the year to $309 million. Among those factors cited by the International Trade Administration for this trend is the proliferation of foreign or "grey" market products entering the U.S. market. These goods tend to be higher-priced prestige lines that are diverted by wholesalers from overseas markets to discounters and mass merchandisers within the U.S. Other factors have been the impact of the strong U.S. dollar on reducing import costs, and major promotional campaigns for prestige products by foreign firms.

U.S. Foreign Trade in Toilet Goods, 1980-1986
(Value in millions of dollars)

	1980	1981	1982	1983	1984(e)	1985(e)	Forecast 1986	% Change 1985/84
Value of imports	$ 85	$ 103	$ 124	$ 172	$ 282	$ 313	$ 400	+ 10.8%
Value of exports	322	371	353	328	331	309	290	- 6.5
Export/shipment ratio	0.039	0.040	0.034	0.029	0.028	0.023	—	—
Import/new supply ratio*	0.010	0.011	0.012	0.016	0.024	0.024	—	—

(e) estimated
* New supply is the sum of product shipments plus imports.

Source: U.S. Department of Commerce,
International Trade Administration,
1986 U.S. Industrial Outlook

PRODUCER PRICE INDEX

The producer price index for cosmetics & toilet preprations, a measure of their average changes in prices at the point of production, rose 3.6% from December 1984 to December 1985. This follows a 2.5% annual rise in the price of these products in 1984. Perfumes and aerosol hair sprays had the largest price gains at the producer level in 1985, rising 14.1% and 13.0%, respectively. There is a good deal of price volatility evident for various products. For example, the price of lip preparations rose 13.2% from 1983 to 1984, yet the price fell 22.3% from December 1984 to December 1985.

Producer (Factory) Price Index for Specified Toiletries & Cosmetics
(1967 = 100, unless otherwise indicated)

	December Average			Annual Average		
	1985	1984	% Change 1985/84	1984	1983	% Change 1984/83
All items	310.2	309.8	+ 0.1%	310.3	303.1	+ 2.4%
Cosmetics & toilet preparations	246.2	237.8	+ 3.6	237.4	231.5	+ 2.5
Shaving preprations**	127.2	119.0	+ 6.9	129.9	124.5	+ 4.3
Shaving soap & cream	304.3	271.3	+12.2	298.6	277.9	+ 7.4
Aftershave preparations*	178.5	173.3	+ 3.0	188.1	184.2	+ 2.1
Perfume, cologne & toilet water**	138.3	125.7	+10.0	133.6	126.9	+ 5.3
Perfume	330.7	289.8	+14.1	302.3	294.8	+ 2.5
Cologne & toilet water	241.2	227.5	+ 6.0	246.2	228.0	+ 8.0
Hair preparations**	120.1	112.1	+ 7.1	112.7	113.0	- 0.3
Soap shampoo	155.7	155.5	+ 0.1	153.3	151.3	+ 1.3
Synthetic organic detergent shampoo**	107.9	100.9	+ 6.8	100.9	100.7	+ 0.2
Hair tonics, incl., conditioners	263.1	255.2	+ 3.1	250.2	250.1	#
Hair dressings**	131.8	134.6	- 2.1	133.3	135.7	- 1.8
Hair spray (aerosol)*	287.3	254.3	+13.0	265.9	271.3	- 2.0
Home & commercial permanents	231.0	242.4	- 4.7	239.1	231.1	+ 3.5
Creams**	141.7	141.8	#	135.8	133.0	+ 2.1
Cleansing creams	384.0	405.9	- 5.4	398.7	384.0	+ 3.8
Foundation creams**	125.8	119.8	+ 5.0	119.8	119.8	--
Lubricating creams**	153.5	159.4	- 3.7	142.7	142.8	#
Other creams**#	131.4	124.0	+ 6.0	123.3	118.7	+ 3.9
Lotions & oils**	126.3	128.8	- 1.9	122.4	120.4	+ 1.7
Suntan & sunscreens**	127.3	118.1	+ 7.8	117.9	111.1	+ 6.1
Hand lotions	189.6	190.5	- 0.5	176.7	173.7	+ 1.7
Other lotions & oils**	123.1	121.0	+ 1.7	119.4	116.7	+ 2.3
Cosmetics**	146.4	161.3	- 9.2	152.9	138.0	+10.8
Lip preparations	198.3	255.3	-22.3	235.1	207.7	+13.2
Blushes**	132.4	130.4	+ 1.5	129.0	122.1	+ 5.7
Eye preparations*	196.6	195.1	+ 1.0	188.4	171.7	+ 9.7
Deodorant**	127.0	120.7	+ 0.8	121.4	119.2	+ 1.8
Aerosol underarm deodorant	237.3	221.4	+ 7.2	223.4	218.5	+ 2.2
Cream, liquid & roll on**	127.0	128.8	- 1.4	128.1	127.5	+ 0.5
Manicure preparations**	108.0	106.4	+ 1.5	na	102.4	--
Powders**	140.3	138.6	+ 1.2	138.3	133.9	+ 3.3
Face powder	268.3	263.6	+ 1.8	263.4	253.5	+ 3.9
Wet application powder**	135.9	133.4	+ 1.9	131.0	126.8	+ 3.3
Bath oils & salts*	165.7	180.2	- 8.0	148.4	155.1	- 4.3

* 12/71 = 100
** 6/80 = 100
na not available
# Less than 0.1%

Source: U.S. Bureau of Labor Statistics

ADVERTISING EXPENDITURES

An estimated $1.1 billion was spent on cosmetics & toiletries advertising in 1984, up 9.6% from the year before, according to an Advertising Expenditure Study by Product Marketing magazine. It should be noted that this data, compiled from material supplied by Leading National Advertisers and the Radio Advertising Bureau, does not account for some end rate discounts that bulk purchasers of TV make. Nevertheless, the data clearly shows large gains for the year in expenditures on national radio advertising (up 39.1%) and magazine ads (up 23.4%).

Advertising Expenditures On Cosmetics & Toiletries, 1983, 1984
(Millions of dollars)

	1984	1983	% Change 1984/83
Total	$1,067.8	$ 974.7	+ 9.6%
Network TV	556.9	539.0	+ 3.4
Magazines	255.4	207.0	+23.4
Spot TV	201.7	179.7	+15.4
Spot Radio	29.1	27.9	+ 4.1
National Radio	13.0	9.3	+39.1
Newspaper Supplements	10.3	10.0	+ 5.8
Outdoor	1.5	1.7	-14.0

Source: Leading National Advertisers,
Radio Advertising Bureau

Advertising expenditures for shampoos & rinses totaled $205.4 million in 1984, the largest expenditure of the various cosmetics & toiletries categories reported by Product Marketing. The leading advertisers for this product group are Procter & Gamble by a wide margin, followed by Helene Curtis, J & J, Revlon and Lever.

The next largest category is the advertising of hair treatments, with expenditures of $152.7 million in 1984. Clairol had more than double the expenditures of the next largest advertiser, L'Oreal Mousse, followed by Vidal Sassoon, Preference and Alberto Culver.

More than $130 million was spent to advertise creams & lotions in 1984, a 5.4% decrease from the year before. Much of this decline came as a result of major network TV cancellations by Gillette's Aapri, Whitehall Laboratories' Youthgarde, Coppertone, and Noxell's Raintree. The leading advertisers in this product group for all media are Oil of Olay (Richardson-Vicks), Vaseline Intensive Care (Chesebrough-Ponds), Night Repair (Estee Lauder), Sea Breeze (Bistol Myers), and Lancome (Cosmair).

ADVERTISING EXPENDITURES

The leading advertisers for other cosmetics & toiletries product categories monitored by Leading National Advertisers are as follows:

Toilet soaps: Procter & Gamble, Unilever, Armour, Colgate, Gillette

Fragrances: Vanderbilt, Chanel, Avon, White Linen, Jontue

Lip & eye makeup: Maybelline, Cover Girl, L'Oreal, Revlon, Max Factor

Facial makeup: Cover Girl, Revlon, Maybelline, Estee Lauder, Max Factor

Manicure products: Cover Girl, Revlon, L'Oreal, Cutex, Sally Hansen

Bath products: Calgon, Avveno, J & J Baby Powder, Shower to Shower, Jean Nate.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

The predominant characteristic in the nation's changing population mix is the aging of the baby boomers. In 1981, the total population age 18 to 24 years was at an all-time high of 30.4 million. This segment has been declining ever since and will drop to an estimated total of only 24.1 million by 1994. By 1990, there will be 18% fewer teenagers than in 1980. The population age 18 to 24 will not start to increase again until 1997, when the baby-boomers' children mature.

This trend is already having an impact on the cosmetics industry. A 1984 survey by Simmons Market Research Bureau showed that 18 to 24 years olds were more likely than any other age group to use perfume, nail polish, shampoo and creme rinses. They are traditionally the heaviest and most experimental makeup users.

The cosmetics industry is adapting to the changing demographics by marketing a greater variety of products designed to lessen the aging process. There has been a proliferation lately of skin treatment products such as Oil of Olay, developed in response to the growing concern for skin tone in an age-conscious population. Consumers are turning more toward moisturizing bath products and makeups, improved sun protectants, and therapeutic brands hyping a scientific anti-aging process such as Estee Lauder's Prescriptives and L'Oreal's Biotherm.

Products specifically developed to attract the over-50 age group are targeted for an increasingly affluent segment of the population. According to the Department of Commerce (*1986 U.S. Industrial Outlook*), this group accounts for 40% of total consumer demand in the U.S. and has half the nation's discretionary income.

THE POTENTIAL MARKET

Size of the Consumer Market

Population Projections - 1984, 1994, 2005
(Middle Series*)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
MALE							
Total, all ages	115,073	125,464	134,297	+16.7%	100.0	100.0	100.0
Under 5 years	9,329	9,635	8,931	- 4.3	8.1	7.7	6.6
5 to 9 years	8,296	9,866	9,094	+ 9.6	7.2	7.9	6.8
10 to 15 years	10,708	11,245	11,698	+ 9.2	9.3	9.0	8.7
16 years & over	86,742	94,718	104,574	+20.5	75.4	75.4	77.9
16 - 19	7,653	6,712	8,058	+ 5.3	6.6	5.3	6.0
20 - 34	31,522	29,725	27,416	-13.0	27.4	23.7	20.4
35 - 54	25,975	35,187	40,769	+56.9	22.6	28.0	30.4
55 - 64	10,375	9,793	14,060	+35.5	9.0	7.8	10.5
65 & over	11,217	13,300	14,271	+27.2	9.7	10.6	10.6
Median age (years)	29.9	33.0	36.0	+20.4	--	--	--
FEMALE							
Total, all ages	121,343	132,251	141,381	+16.5%	100.0	100.0	100.0
Under 5 years	8,904	9,188	8,518	- 4.3	7.3	6.9	6.0
5 to 9 years	7,924	9,415	8,678	+ 9.5	6.5	7.1	6.1
10 to 15 years	10,236	10,745	11,167	+ 9.1	8.4	8.1	7.0
16 years & over	94,279	102,903	113,018	+19.9	77.7	77.9	80.0
16 - 19	7,357	6,426	7,707	+ 4.8	6.1	4.9	5.5
20 - 34	31,205	29,068	26,706	-14.4	25.7	22.0	18.9
35 - 54	27,115	36,202	41,249	+52.1	22.3	27.4	29.2
55 - 64	11,834	11,002	15,399	+30.1	9.8	8.3	10.9
65 & over	16,768	20,205	21,957	+30.9	13.8	15.3	15.5
Median age (years)	32.4	35.6	39.2	+21.0	--	--	--
TOTAL, MALE & FEMALE							
Total, all ages	236,416	257,714	275,677	+16.6%	100.0	100.0	100.0
Under 5 years	18,232	18,823	17,449	- 4.3	7.7	7.3	6.3
5 to 9 years	16,219	19,281	17,772	+ 9.6	6.9	7.5	6.5
10 to 15 years	10,944	21,991	22,865	+ 9.2	8.9	8.5	8.3
16 years & over	181,021	197,619	217,591	+20.2	76.5	76.7	78.9
16 - 19	15,009	13,138	15,765	+ 5.0	6.3	5.1	5.7
20 - 34	62,726	58,792	54,122	-13.7	26.5	22.8	19.6
35 - 54	53,090	71,389	82,018	+54.5	22.4	27.7	29.7
55 - 64	22,210	20,793	29,459	+32.6	9.4	8.1	10.7
65 & over	27,986	33,507	36,227	+29.4	11.8	13.0	13.1
Median age (years)	31.1	34.3	37.6	+20.9	--	--	--

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 952 (May 1984)

CONSUMER EXPENDITURES

The nation's consumers spent an estimated total of $23.3 billion for toilet articles and preparations of all types in 1985. This was nearly 6% above the total of $22.0 billion reported by the Bureau of Economic Analysis for the year 1984. The 1984 total was 7.8% higher than in 1983, as revised by the Bureau.

On a constant dollar basis, eliminating the effects of inflation, spending in 1985 gained 2.5% over 1984. Included in the personal consumption figures compiled by the Bureau are cosmetics, fragrances and toilet preparations, as well as hair dryers and other personal care items. The figures include shampoos, hair sprays, etc. that are purchased over-the-counter by consumers in beauty salons and barbershops, but not those products that are used by the stylists to treat their customers.

Personal Consumption Expenditures For
Toilet Articles & Preparations, 1980-1985
(Billions of dollars)

	1985	1984	1983(r)	1982(r)	1981(r)	1980(r)	% Change 1985/84
Total, current $	$23.3	$22.0	$20.4	$18.8	$17.9	$16.4	+ 5.9%
Total, constant (1982) $	20.6	20.1	19.2	18.8	19.4	19.6	+ 2.5

(r) revised

Source: U.S. Department of Commerce,
Bureau of Economic Analysis

Spending By Product Type

Definitive figures on retail sales of toiletries, cosmetics, and fragrances are difficult to arrive at, due to the lack of a uniform definition of products to be included in this classification, as well as the great variety of retail outlets selling these products.

Product Marketing magazine, a trade publication, estimated the size of the market at $15.8 billion in 1984, an increase of 7.2% over their 1983 estimate of $14.8 billion. Their definition of the market, in terms of products, is narrower than that used by the U.S. Bureau of Economic Analysis. Chain Store Age places retail sales of health and beauty aids at $18.1 billion in 1984, an 11% gain from their 1983 figure. According to Business Week, sales rose 8% in 1984 to $19.5 billion. Advertising Age places 1985 sales at $20 billion, an increase of 5% from 1984.

Drawing on various market studies, and taking into account information from the great variety of retail outlets involved--department stores, mass merchandisers, supermarkets, house-to-house, etc. -- Product Marketing has compiled estimates on sales of specific product categories, which are intended to show changes and trends, rather than to precisely define exact dollar amounts. These figures are covered in the following tables.

CONSUMER EXPENDITURES

Spending By Product Type

Cosmetics, Fragrances, Toiletries
Estimated Volume At Retail, 1980-1984

(Millions of dollars)

	1984	1983	1982	1981	1980	% Change 1984/83
Cosmetics, fragrances, toiletries, total	$15,880.5	$14,820.5	$13,798.3	$12,872.1	$11,440.1	+ 7.2%
Cosmetics	4,298.0	3,845.8	3,584.2	3,454.9	3,012.5	+11.8
Fragrances, women's	2,709.8	2,469.2	2,187.8	2,123.7	1,974.2	+ 9.5
Hair products, women's	2,967.9	2,804.7	2,679.5	2,321.6	2,070.3	+ 5.8
Men's toiletries	1,071.5	1,022.1	918.0	879.7	850.8	+ 4.8
Skin preparations	2,628.4	2,632.5	2,498.1	2,352.0	1,965.0	- 0.2
Personal cleanliness (bath soaps, external deodorants)	2,204.9	2,046.2	1,930.5	1,740.3	1,556.8	+ 7.8

Source: Product Marketing: 38th Annual Consumer Expenditure Study (July 1985 issue)

Estimated Consumer Expenditures for Specified Product Classifications
1983, 1984

(Millions of dollars)

	1984	1983	% Change 1984/83
Total, all products	$15,880.5	$14,820.5	+ 7.2%
Cosmetics, total	4,298.0	3,845.8	+ 11.8
Make-up preparations	1,362.4	1,174.7	+ 20.0
Lipsticks	675.6	581.9	+ 16.1
Lip gloss	149.9	142.9	+ 4.9
Eye makeup	1,163.8	1,060.8	+ 9.7
Nail products	704.2	652.8	+ 10.9
Other, including accessories	242.3	232.7	+ 4.1
Fragrances, women's, total	2,709.8	2,469.2	+ 9.5
Perfume	207.3	212.0	- 2.2
Toilet water, cologne	1,878.9	1,674.5	+ 12.2
Gift sets	297.7	263.0	+ 13.2
Scented bath products	239.4	235.9	+ 1.4
Bubble bath	86.5	83.7	+ 2.6
Hair products, women's	2,967.9	2,804.7	+ 5.8
Shampoos	1,128.7	1,084.2	+ 4.1
Conditioners	397.4	383.2	- 1.2
Dressings (including mousse products)	112.1	43.0	+160.6
Color preparations	582.4	569.5	+ 2.3
Home permanents	120.4	116.5	+ 3.4
Straighteners	55.9	62.6	- 10.7
Wave sets	27.1	25.7	+ 5.5
Fixatives	493.9	462.9	+ 6.5
Ethnic wave products	67.9	57.1	+ 19.1

(continued)

Spending By Product Type

Estimated Consumer Expenditures for Specified Product Classifications 1983, 1984
(Millions of dollars)
(continued)

	1984	1983	% Change 1984/83
Men's toiletries, total	$1,071.5	$1,022.1	+ 4.8%
Colognes	262.6	255.7	+ 2.3
Talcum powder	7.1	7.2	- 4.3
Gift sets	118.1	107.2	+ 10.2
Hair products (sprays, gels)	139.8	136.8	+ 2.0
Hair coloring	27.4	28.3	- 3.1
Shave cream	197.3	186.0	+ 6.1
After-shave products	276.8	262.2	+ 3.6
Skin treatment products	14.9	12.7	+ 17.4
Pre-shave products	21.8	20.6	+ 5.9
Skin preparations, total	2,628.4	2,632.5	- 0.2
Suntan, sunscreen products	254.0	239.2	+ 6.2
Acne products	163.4	160.1	+ 2.1
Face creams/cleansers	556.6	567.2	- 1.8
Face lotions/moisturizers	454.4	481.8	- 5.7
Body lotions/emollients	399.6	372.1	+ 5.8
Hand creams	69.3	73.4	- 5.7
Personal cleanliness, total	2,204.9	2,046.2	+ 7.8
Bath soaps	1,226.6	1,196.6	+ 2.5
External deodorants	978.3	849.6	+ 15.1

Source: Product Marketing, 38th Annual Consumer Expenditure Study (July 1985 Issue)

Cosmetics

After adjusting for price increases in cosmetic products, total retail sales in cosmetics have been flat for the past few years. The double-digit gain in consumer expenditures in 1984 was due to a strong performance by prestige lines, coupled with price increases averaging between 6% and 8% for color items.

Some of the biggest names in the industry, including Max Factor and Revlon have experienced profit declines and loss of market share in recent years. Some companies have not adapted as well as others to a key demographic trend impacting on the consumption of cosmetics: the decline of the teenage market. This group is traditionally the heaviest users of makeup but their number is decreasing. In addition, house-to-house operations have slumped as the proliferation of women in the work force has left fewer women at home when sales representatives call. Both Avon and Mary Kay have seen their sales slump significantly in the 1980's.

CONSUMER EXPENDITURES

Spending By Product Type

Cosmetics (continued)

Mass market companies such as Maybelline and Noxell Corp. (Cover Girl) have held their own, with Maybelline's sales up about 13% a year for each of the last two years while Noxell has a 16% compounded growth rate. In 1984, Maybelline's ad budget was $34 million, the largest in the company's history, since surpassed by the $50 million it spent in 1985. The company budgets about 21% of sales on advertising, one of the highest ratios in the industry. In 1986, Noxell is expected to spend about $50 million on advertising, with a portion targeted for the introduction of Clean Lash, a waterproof mascara that can be removed with soap and water, and Luminesse satin finish nail color. Maybelline accounts for about 20% of makeup unit sales in mass outlets, followed by Cover Girl with 18% and Revlon with 16%.

The intensely competitive nature of the cosmetics industry has encouraged diversion of prestige products from regular distribution channels to discount mass market outlets. There is also a powerful trend to growing market segmentation based on demographics: ethnic groups and the elderly are being targeted as never before. The black market is growing much faster than the white market, and it is much younger, an appealing consideration for cosmetic manufacturers. The youth-conscious over-50 population, a group with a good deal of discretionary income, are being targeted with a wide variety of skin tone and conditioning products.

Fragrances

Retail sales of men's & women's fragrance products totaled an estimated $3.8 billion in 1985, a gain of 5.6% for the year, according to data provided by The Fragrance Foundation. Sales adjusted for inflation, however, have slowed to an average of 2% a year since 1980, after annual sales and net profit gains of 8%-10% above the inflation rate throughout the 1980's. Average net profit margins now stand at 5%-7%, the result of intense competition and heavy promotional outlays.

The fragrance industry is mature, precipitating increased expenditures on reseach and development by companies eager to establish their niche in the market. Whereas a decade ago, the average new perfume would have a projected market life of about eight years, heightened competition has now sliced this to three years. In 1985, there were 82 new fragrance introductions, up from 75 in 1984.

Marketers of fragrances are spending heavily on promotions to improve their market share, particularly to introduce new brands. Snap and sniff envelopes, first employed in the 1983 introduction of Giorgio, are now a standard promotional tool. In-store sampling, gift-with-purchase programs and designer/celebrity endorsements have all taken on increased importance in a time of slow industry growth.

Spending By Product Type

Fragrances (continued)

Prestige fragrances, including Giorgio (Giorgio Parfums) at $150-per-oz. and Obsession (Calvin Klein) at $160-per-oz. are showing strong performances through exclusive distribution, but the field is getting increasingly crowded. On February 24th, Avon Products (the overall leader in market share, followed by Squibb's Charles of the Ritz division) launched a $150-per-oz. fragrance named Deneuve (after the French actress). Such launches at the high end of the market are quite costly, led by the $15 million that Calvin Klein Cosmetics Corp. spent to introduce Obsession.

A past and still present danger for prestige lines is their illegal diversion to mass market outlets. The switching of export shipments to unauthorized domestic outlets such as discounters and chains generally deprives fragrance manufacturers of sales in the long-run by shortening the product life cycle for these prestige brands. The availability of the fragrances at reduced prices may spur unit volume but limits dollar growth.

Another problem for the manufacturers of prestige fragrances is the proliferation of knockoffs, inexpensive imitations of the original. Fragrance industry executives estimate perfume knockoff sales in 1986 to be between $100 million and $125 million. They are distributed in drug chains and mass volume retail outlets and appeal to consumers that are unable to afford the designer product. Knockoffs, which were started about six years ago when prices of prestige products rose dramatically, are backed by aggressive comparison advertising stressing their low price points. In addition, knockoff producers have lower packaging costs, no designer royalties to pay, and are not faced with the high advertising/promotional costs that dealing with department store outlets entails.

Estimated Retail Sales of Fragrance Products
(Perfumes, Colognes, Toilet Water)
(Billions of dollars)

Year	Total	Women's	Men's
1985	$ 3.8	$ 2.7	$ 1.1
1984	3.6	2.6	1.0

Source: The Fragrance Foundation

Recognizing the need to open new markets in the fragrance industry, companies are earmarking research and development expenditures toward the formulation of fragrance products that will have a soothing psychological effect. These "aroma therapy" products are being adapted for use as bath products (Avon's Tranquil Moments), body treatment products (Revlon), and to be dispensed in rooms and automobiles (Charles of the Ritz). International Flavors and Fragrances, Inc. has put $34 million into aroma therapy research in 1985, as the industry seeks to reverse flat sales with new product concepts.

CONSUMER EXPENDITURES

Spending By Product Type

Makeup

Makeup Sales By Type of Outlet, 1980 and 1984

	1984	1980
Total retail sales (Bil. of $)	$ 3.6	$ 2.5
Percent of sales by outlet:	100%	100%
Drug and department stores	66	72
Mass merchandisers and food stores	23	17
Door-to-door	11	11

Source: Business Week, September 23, 1985

RETAIL SALES BY OUTLET TYPE

The U.S. Census Bureau has recently released data on sales of health and beauty aids by type of outlet from the 1982 census of retail trade. This is a complete census of all retail establishments with payroll in the U.S. and is part of the economic census program undertaken by the Census Bureau every five years.

The Census Bureau included sales of prescription drugs in its totals for the health and beauty aids category for the first time in the 1982 census. This swelled drug and proprietary stores' share of total HBA sales. Since this Fact File does not cover prescription drugs, market shares were recalculated to account for over-the-counter products only.

Sales of Health & Beauty Aids By Major Type of Retail Outlet, 1982

	Sales By Outlet Type	
	Millions of $	Percent of Total
Health & beauty aids, total	$ 20,177 (e)	100.0%
Drug and proprietary stores	7,304	36.2
Drug stores	6,759	33.5
Proprietary stores	545	2.7
General merchandise group stores	6,235	30.9
Department stores	4,802	23.8
Food stores	5,206	25.8
Grocery stores	5,165	25.6
Apparel and accessory stores	364	1.8
Other retailers	1,069	5.3

(e) estimated

Source: Based on U.S. Bureau of the Census,
1982 Census of Retail Trade RC-82-1-3

Separate information on cosmetic sales was reported in the 1982 census of retail trade for department stores and for drug stores.

Department Store & Drug Store Sales of Cosmetics, 1982
(Dollar sales in thousands)

	No. of Stores		Sales of Cosmetics		
				% of Total store sales of--	
	Total	Selling Cosmetics*	Total	Stores Selling Cosmetics	All Stores
Department stores	9,981	9,328	$3,848,865	4.0%	3.9%
Drug stores	46,661	33,913	2,180,555	7.4	6.2

* Includes face creams, makeup, perfumes, etc.

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade Merchandise Line Sales (RC82-1-3)

Department Stores

Cosmetic counters in department stores are an integral part of their operation. The stores allocate space to the different vendors so as to maximize sales per square foot in the department, and salespeople at the counters are usually trained and paid by the vendor and work exclusively at promoting their product lines. Vendors seeking additional footage in department stores try to entice the store with promises of increased advertising expenditures and promotional campaigns. A counter that is not generating sufficient revenue for the store risks losing its space in the department.

Cosmetics, fragrances and toiletries sales in department stores registered a typical (median) gain of 13.7% in 1984, according to the National Retail Merchants Association. The typical increase in sales for all upstairs departments that year was 8.5%. Sales per square foot in the cosmetics, fragrances and toiletries departments were, at $250.30, nearly double than reported for all upstairs departments.

Merchandising & Operating Results of Cosmetics, Fragrances & Toiletries Departments in Department Stores with Sales Over $1 Million, 1984
(Median results)

	Total Upstairs Departments (107*)	Cosmetics, Fragrances & Toiletries (90*)
Net sales, % change from last year	+ 8.5%	+ 13.7%
Sales, % of merchandising division**	--	79.9
Sales, % of total store sales	93.9	6.3
Cumulative markon, %	49.0	39.7
Gross margin, % of sales (incl. cash discounts)	41.2	38.8
Markdowns, % of sales (incl. employee discounts)	18.8	1.3
Salespeople's salaries, % of sales	7.6	7.7
$ Sales per sq. ft. of selling space (main or largest selling unit)	$127.0	$250.3
Number of stock turns (times)	2.7	2.5

(footnotes on following page)

RETAIL SALES BY OUTLET TYPE

(footnotes from previous table)

* Number in parentheses represents the number of reporting firms in each category.
** Cosmetics, fragrances and toiletries department is in the personal needs and small wares merchandise division.

Source: National Retail Merchants Association,
Merchandising & Operating Results, 1984 (1985 edition)

Grocery Stores & Other Outlets

The trade publication, Supermarket Business, compiles annual estimates on the total value (at grocery store prices) of total consumption of toilet goods products and the amount sold in grocery stores. Selected major categories from this report are noted below.

Value of Total Domestic Consumption & Spending in Grocery Stores, 1984
(Dollar figures in thousands)

Toilet goods	Value (grocery store prices) of Total Domestic Consumption*	Amount Spent in Grocery Stores
Reported products, total	$10,128,399	$2,477,958
Cosmetics	4,249,531	529,295
Eye makeup products	2,329,554	452,630
Lipstick	1,183,309	40,730
Makeup bases	597,762	29,713
Pressed cake powders, blush	138,906	6,222
Hair products	3,720,731	1,462,900
Coloring preparations	575,387	84,193
Cream rinses	150,871	83,361
Dandruff rinses	16,078	5,754
Men's hair dressings	123,802	60,682
Shampoos	1,186,980	727,644
Other hair preparations, (incl. permanent wave kits)	808,221	313,989
Hair accessories (combs, barrettes, etc.)	859,392	187,276
Nail care products	478,202	85,308
Manicure implements	142,490	37,198
Nail polish enamel	281,510	36,562
Nail polish remover	54,202	11,547
Bath products	158,144	33,822
Bath salts, tablets, oils, etc.	97,191	26,245
Talcum, body powder	60,953	7,577
Skin care products	1,521,791	366,633
Face creams	680,208	136,568
Face lotions, astringents	113,060	12,581
Hand & body lotions	328,555	131,151
Hand creams	24,624	5,919
Lip protectors	33,863	9,525
Liquid facial cleansers	105,461	29,544
Suntan, sunscreen products	236,021	41,344

* Consumption covers total consumption, whether through purchases at retail stores or consumed in a beauty shop, institution, etc., valued at grocery store prices. These values, therefore, may generally exceed the value of over-the-counter retail sales of toilet goods.

Source: Supermarket Business: 38th Annual Consumer Expenditures Study (September 1985)

RETAIL SALES BY OUTLET TYPE

Grocery Stores & Other Outlets (continued)

Compilations by A.C. Nielsen Marketing Research indicates the share of total sales of specified types of toilet goods done in three outlet types: grocery stores, drug stores and mass merchandisers. In general, Nielsen reported that price increases on most items were slightly greater in grocery stores compared with the previous year than for other store types, reflecting the growing competition between drug stores and mass merchandisers.

Sales of Specified Total Goods in Grocery Stores, Drug Stores & Mass Merchandisers, Percent of Total Accounted For by Each Store Type

	Grocery Stores	Drug Stores	Mass Merchandisers
Shampoos	52.5%	28.5%	19.0%
Deodorants	52.1	28.7	19.2
Hair fixatives	47.7	31.8	20.5
Men's hair preparations	46.0	38.6	15.4
After-shampoo products	42.9	37.7	19.4
Hand/body lotions	36.7	47.3	16.0
Mousse	34.1	51.8	14.1
Face creams, lotions	24.8	58.4	16.8
Ethnic hair preparations	24.2	57.2	18.6
Home wave kits	19.8	54.4	25.8
Hair color	19.1	58.3	22.6
After-shave lotions, colognes	16.8	58.0	25.2
Color cosmetics (lipstick, rouge, etc.)	16.6	59.9	23.5

Source: Nielson Retail Index

RETAIL SALES BY METRO MARKETS

The Top 25 Metropolitan Markets Based on Sales of Health & Beauty Aids, 1984

1984 Rank	Metropolitan Area	Sales (Mil. $)	% of U.S. Total
1	Los Angeles/Long Beach	$788.9	3.8%
2	New York	745.5	3.6
3	Chicago*	636.0	3.1
4	Boston/Lawrence/Salem	584.6	2.8
5	Detroit	492.6	2.4
6	Washington, D.C.	484.3	2.3
7	Philadelphia	406.6	2.0
8	Atlanta	321.5	1.5
9	Houston	302.9	1.5
10	Nassau/Suffolk, N.Y.	285.8	1.4

(continued)

RETAIL SALES BY METRO MARKETS

The Top 25 Metropolitan Markets Based on Sales of Health & Beauty Aids, 1984
(continued)

1984 Rank	Metropolitan Area	Sales (Mil. $)	% of U.S. Total
11	Anaheim/Santa Ana	$ 228.4	1.1%
12	St. Louis	225.1	1.1
13	Miami/Hialeah	214.3	1.0
14	Phoenix	203.7	1.0
15	Dallas	198.9	1.0
16	Minneapolis/St. Paul	198.0	1.0
17	Cleveland	194.1	0.9
18	San Diego	182.9	0.9
19	Pittsburgh	182.1	0.9
20	Oakland	165.3	0.8
21	Newark	164.6	0.8
22	Bergen/Passaic, N.J.	156.7	0.8
23	Riverside/San Bernardino, Ca.	154.0	0.7
24	San Francisco	150.4	0.7
25	Kansas City	149.7	0.7
	25 Metropolitan areas, total	$ 7,816.9	37.6%
	U.S. total	$20,801.5	100.0%

* The high-ranking status of Chicago is due, in part, to the catalog headquarter operations of Sears, Roebuck & Co.

Note: Sales & Marketing Management's definition of health & beauty aids includes health aids, cosmetics and other hygiene needs.

Source: Based on Sales & Marketing Management,
"Survey of Buying Power", 1985
(All rights reserved.)

CONSUMER PRICES

The overall level of consumer prices for toilet goods and personal care appliances, as measured in the Consumer Price Index, gained 3.2% in 1985, slightly less than the 3.4% rise in the price index for these goods during 1984.

The category covering cosmetics, bath and nail preparations, etc., registered a 3.3% gain in price levels at retail in 1985 compared with 1984.

CONSUMER PRICES

Consumer Price Index For Toiletries & Cosmetics, 1983-1985
(1967 = 100, unless otherwise stated)

	Annual Averages			% Change
	1985	1984	1983	1985/84
All items	322.2	311.1	298.4	+ 3.6%
Personal care*	279.6	269.4	259.1	+ 3.8
Toilet goods & personal care appliances	279.0	270.3	261.4	+ 3.2
Products for the hair, hair pieces & wigs**	157.1	154.6	150.6	+ 1.6
Cosmetics, bath & nail preparations, manicure & eye makeup implements**	159.0	153.9	148.1	+ 3.3

* Includes detail and shaving products.
** December 1977 = 100

Source: U.S. Bureau of Labor Statistics.

CONSUMER BUYING HABITS

Women's Cosmetics

In 1985, Mademoiselle magazine surveyed its readers to provide comprehensive information on their usage and buying patterns in several HBA product areas. The results, based on a representative sampling of both subscribers and newsstand buyers, offer valuable insights into the marketplace.

Percent of MADEMOISELLE Readers Using Specified Cosmetics and Their Frequency of Usage

	Percent Using*	Frequency of Usage**			Average Price Paid**
		Daily	Few Times a Week	Less Often	
Face Powder					
Pressed powder	42%	59%	18%	23%	$ 5.44
Loose powder	42	67	15	18	8.36
Foundation, Makeup Base					
Liquid	66	69	16	15	7.65
Cream	18	63	20	17	7.92
Makeup stick	18	70	15	15	2.77
Blusher					
Powder	89	82	12	6	6.64
Cream	17	60	19	21	6.06
Eye Shadow					
Powder	89	68	20	12	5.44
Crayon pencil	36	57	27	16	4.11
Wand applicator	18	60	21	19	4.32
Liquid eye shadow primer	15	59	23	18	5.98
Powder pencil	13	46	35	19	4.80

(continued)

CONSUMER BUYING HABITS

Women's Cosmetics

Percent of MADEMOISELLE Readers Using Specified Cosmetics and Their Frequency of Usage
(continued)

	Percent Using*	Frequency of Usage** Daily	Frequency of Usage** Few Times a Week	Frequency of Usage** Less Often	Average Price Paid**
Eye Liner					
Pencil	74%	73%	20%	7%	$ 4.23
Liquid	15	59	21	20	3.90
Mascara					
Lash lengthener	53	85	11	4	4.91
Comb-on	31	77	13	10	4.25
Automatic roll-on	29	81	13	6	4.70
Eyebrow Makeup					
Wood pencil	18	57	17	26	2.91

Base: * Total respondents
** Users of each product category

MADEMOISELLE Readers' Place of Purchase of Cosmetics
(Base = Users of each product)

	Drug Store	Dept. Store	Home Agent	Discount House	5 & 10 Variety	Super-Market	Makeup Salon
Foundation makeup	30%	49%	13%	9%	3%	7%	10%
Lipstick/lipgloss	45	47	13	11	4	9	5
Face powder	35	47	9	10	3	8	8
Blusher	35	50	13	9	3	8	9
Eye makeup	46	47	13	13	4	11	9

Note: Columns add to more than 100% due to multiple responses.

Source: Mademoiselle magazine
Beauty/Health Survey 1985

Women's Cosmetics (continued)

A September 1984 Glamour magazine survey on the beauty market consisted of 2,500 presently employed readers selected from a panel of subscribers and newstand purchasers.

Usage of Cosmetic Products By GLAMOUR Readers

		When Used**			
	Percent Using*	Weekdays In the Office	Weekdays At Home	Weekends	Evenings/ Special Occasions
Blusher	96%	88%	61%	79%	95%
Foundation	74	80	49	65	93
Face powder	60	80	47	65	93
Lipstick	84	80	37	65	95
Lip gloss	60	70	50	67	87
Eye shadow	92	81	48	72	95
Eye liner	69	79	49	70	94
Mascara	94	87	65	83	95

Base: * Total respondents
** Users of each product

Age When GLAMOUR Readers First Bought Cosmetic Products

	Median age
Lipstick	16.0
Blusher	16.0
Eye cream	18.9
Mascara	15.7
Foundation	17.1

Most Valuable Sources of Information About New Beauty Products For GLAMOUR Readers

Magazines	91%
Friends	30
Beauty samplers	30
Store promotions	23
Cosmetics salespeople	17
Salons	9
Business associates	5
Newspapers	4

Note: Column adds to more than 100% due to multiple responses.

Source: Glamour magazine
Beauty & Grooming Products Survey 1984

CONSUMER BUYING HABITS

Women's Fragrances

A telephone interview study conducted by R.H. Bruskin Associates in early 1986 shows that 88% of all women use perfume or cologne at least once during an average month. The average for all women who use it is 20 days per month. Of these users, 54% respond that they most frequently purchase it themselves and 46% indicate they most frequently receive it as a gift. When they do receive it as a gift, 54% report that it was given to them by another woman, while 33% say that the gift was most often given to them by a man. The remaining 13% responded that it was about equal.

When asked if they wear a fragrance, 97% of the Mademoiselle readers taking part in its 1985 Beauty/Health Survey answered that they did. Of those answering affirmatively, 69% responded that they wear perfume, 81% wear cologne, and 11% wear toilet water (the total exceeds 100% due to multiple responses). The large majority of the readers (77%) use a fragrance daily.

MADEMOISELLE Readers' Place of Purchase of Fragrances
(Base = Users of each product category)

Place of Purchase	Perfume	Cologne/Toilet Water
Department store	71%	66%
Drug store	27	28
Home agent	6	7
Discount house	6	9
All other	7	7

Note: Columns add to more than 100% due to multiple responses.

Price Paid for Fragrances by MADEMOISELLE Readers
(Base = users of each product category)

Perfume

Price Paid	Percent
Under $10.00	16%
$10.00 - $15.00	10
15.00 - 20.00	15
20.00 - 30.00	22
30.00 - 40.00	12
40.00 - 50.00	11
50.00 & over	14

Median price paid: $23.61
Mean price paid: $29.16

Cologne/Toilet Water

Price Paid	Percent
Under $5.00	6%
$5.00 - $10.00	22
10.00 - 15.00	16
15.00 - 20.00	22
20.00 - 30.00	22
30.00 & over	12

Median price paid: $16.49
Mean price paid: $18.16

Source: Mademoiselle magazine
Beauty/Health Survey 1985

CONSUMER BUYING HABITS

Women's Fragrances (continued)

Virtually every teen girl uses a fragrance, nearly nine out of ten use perfume, and almost three-fourths of the girls use cologne/toilet water. These are among the findings of the 1985 Seventeen magazine Fragrance Study. In June 1985, 2,000 members of Seventeen's Consumer Panel, representing a cross section of the teenage market, received mail questionnaires. The panel is balanced by age and geographic region to accurately reflect the national composition of girls aged 13-19.

The study shows that 99.6% of all respondents use any fragrance, with 87.5% using perfume and 73.7% using cologne/toilet water. Nearly 62% of all girls use both perfume and cologne/toilet water. Department stores, followed by drugstores, are the most popular place of purchase for both perfume and cologne/toilet water.

Form of Fragrance Used by SEVENTEEN Readers
(Base = Users of each product category)

	Perfume	Cologne/Toilet Water
Spray	82.6%	79.1%
Liquid in a bottle	67.0	65.4
Solid perfume (cream) compact	8.2	--
Skin perfume oil	7.0	--
Perfume packettes	6.5	--
Cream sachet	2.5	2.6
Stick	0.5	9.8
Cologne packettes	--	4.4

Note: Columns add to more than 100% due to multiple responses.

Importance of Selected Factors To SEVENTEEN Readers
In Purchasing a Fragrance
(Base = Total respondents)

	Important	Neutral	Not Important	No Answer
Long-lasting scent	78.3%	17.6%	3.0%	1.1%
Received sample	58.0	30.7	9.6	1.7
Appeal to boys	57.6	29.4	12.1	0.9
Price	43.5	41.3	13.8	1.4
Friend's recommendation	23.6	57.6	17.7	1.1
Name of fragrance	22.5	37.1	38.8	1.6
Maker of fragrance	21.3	41.2	36.3	1.2
Advertising	14.3	47.0	37.0	1.7
Salesperson's recommendation	13.7	40.5	44.4	1.4
Packaging	10.2	37.7	50.4	1.7

Source: Seventeen Magazine
Fragrance Survey 1985

Women's Fragrances (continued)

A large majority of Mademoiselle and Seventeen readers buy fragrances for themselves and/or receive fragrances as gifts. The Seventeen survey reports that 69% of girls who use perfume both buy it for themselves and receive it as a gift; 66.6% of girls who use cologne/toilet water both buy it for themselves and receive it as a gift.

Both sets of readers are generous in giving fragrances as gifts. Three quarters of Mademoiselle readers give perfume, cologne or toilet water as gifts. They give an equal percentage to family and to friends. The Seventeen survey shows that 59.0% of its readers gave fragrance gifts to females in the past year.

Fragrance Gift Giving to Females by SEVENTEEN Readers
(Base = Respondents who gave each type of fragrance)

	Perfume	Cologne/Toilet Water
Girlfriend(s)	52.9%	64.6%
Mother	58.7	47.5
Sister(s)	14.3	14.6

Nearly 51% of Seventeen readers gave fragrance gifts to males in the past year.

Fragrance Gift Giving to Males by SEVENTEEN Readers
(Base = Respondents who gave each type of fragrance)

	Cologne	After-Shave Lotion
Boyfriend(s)	62.7%	36.4%
Father	31.6	65.4
Brother(s)	23.3	12.0

Source: Seventeen magazine
Fragrance Survey 1985

Women's Skin Care Products

Women begin using skin care products at an early age and, as they see their skin aging in later years, turn increasingly to these products to slow the aging process. The proliferation of skin care items that promise a more youthful look is tied to the aging of the baby boom generation and a growing age-consciousness in the population as a whole.

A survey of Glamour readers shows that the median age when they first purchased medicated face creams was 15.7 years old and 22.0 when they first purchased night cream. Glamour readers' median age when they first noticed wrinkles is 27.7 years old.

CONSUMER BUYING HABITS

Women's Skin Care Products (continued)

About three quarters have noticed a visible improvement in their skin since they have been using skin care creams or lotions. About 70% of the readers buy skin care products from different companies, while the rest buy a complete skin care regimen.

More than 80% of Mademoiselle readers use skin care products specially formulated for their skin type. Drug stores (51%) and department stores (46%) are the leading outlets where they purchase these products.

Percent of MADEMOISELLE Readers Using Specified Skin Care Products and Their Frequency of Usage

		Frequency of Usage**				
	Percent Using*	More Than Once a Day	Daily	A Few Times a Week	Less Often	Average Price Paid**
Cleansing cream	40%	24%	57%	13%	6%	$ 6.90
Cleansing lotion	19	32	38	24	6	8.70
Cleansing bar/soap	66	56	32	8	4	3.80
Astringent	45	33	34	22	11	6.51
Freshener	21	28	38	25	9	7.79
Toner	17	27	32	28	13	7.86
Moisturizer cream	48	34	51	10	5	9.38
Moisturizer liquid	48	40	46	10	4	7.92
Eye cream	28	17	52	19	12	10.31
Deep cleansing exfoliate	28	--	--	51	49	9.36
Night repair cream/ lotion	21	--	69	16	15	13.30

Base: * Total respondents
** Users of each product

Source: Mademoiselle magazine
Beauty/Health Survey 1985

Women's Hair Care Products

Hair care products, led by the soaring success of mousee styling foams, is clearly a growth category. Manufacturers, facing an increasingly competitive field, are bringing out product lines targeted for more specific markets. The hair care needs of an aging population are being met with products such as Johnson & Johnson's Affinity. Procter & Gamble has a new line of shampoo and conditioner for permed and colored hair.

Mousse was first introduced by L'Oreal (Cosmair) and sales grew rapidly with many other major firms entering the market. The success of this product category can be seen in its acceptance by Glamour readers. More than 80% of those who use mousse like it better than setting lotions and 75% like it better than gels. Readers cite the control and volume they get from it but feel that mousse advertising should include more styling information.

CONSUMER BUYING HABITS

Women's Hair Care Products (continued)

MADEMOISELLE Readers' Place of Purchase of Hair Care Products
(Base = users of each product category)

	Drug Store	Supermarket	Discount House	Hair Salon	Dept. Store
Shampoo	32%	26%	18%	18%	12%
Creme rinse	32	29	15	18	13
Hair conditioner	31	24	17	20	12
Styling mousse	41	20	16	18	9
Hair spray	38	23	16	--	10
Hair coloring products	54	18	23	3	10
Hair setting/styling lotion	34	13	15	32	9

Note: Columns add to more than 100% due to multiple responses.

Source: Mademoiselle magazine
Beauty/Health Survey 1985

Nearly 63% of Seventeen readers shampoo their hair seven times a week or more, according to the magazine's 1985 Hair Care Survey. Over half select the brand of shampoo they use and an additional 30% select the brand with their mothers.

Type of Shampoo Used by SEVENTEEN Readers

Conditioning shampoo	55.4%
Regular/normal	49.1
Natural/organic	19.0
Non-alkaline (pH balance)	15.8
Oily hair	14.2
Protein	12.9
Color highlight	11.2
Shampoo for blow-dried hair	11.1
Dry hair	9.0
Fruit fragrance	8.0
Herbal	8.0
Anti-dandruff	7.6
Baby shampoo	6.7

Note: Column adds to more than 100% due to multiple responses.

Source: Seventeen magazine
Hair Care Survey 1985

CONSUMER BUYING HABITS

Men's Cosmetics & Fragrances

A survey of the buying habits of M magazine subscribers shows that more than 76% use a fragrance on a daily basis. They each received an average of 3.63 men's cologne products as a gift in the past year and an average of 5.41 men's aftershave products.

Buying Habits of M Magazine Subscribers, 1985

	Percent Purchasing	Average Number Purchased	Average Price Paid Per Product	Percent of Purchases in Dept. Stores
Men's Cologne	66.7%	2.86	$ 28.00	69.3%
Men's Aftershave Lotion	32.7	2.94	18.00	62.0
Men's Treatment Products	38.1	3.58	19.00	70.0
Women's Cologne/Perfume	31.6	2.76	44.00	76.0

Source: Purchasing Habits of M Subscribers
(Fairchild Publications)
October 1985

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now--198 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by productior value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumber buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S.mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change. For orders and further information, please write to:

FAIRCHILD FACT FILES,
Fairchild Books,
7 East 12th Street, New York, N.Y. 10003

C 3400-1.87-4

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

42-1

6263

2-16's
1-8
1-4
Cover

400
Cps

Hosiery/Legwear (Men's, Women's and Children's)

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst
Kenneth Greenman, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

TABLE OF CONTENTS

Page
MARKET TRENDS 1

AT THE MANUFACTURER LEVEL 1
  GENERAL INDUSTRY STATISTICS 2
    EMPLOYMENT & EARNINGS 4
  LOCATION OF THE INDUSTRY 8
  NATIONAL ADVERTISING 9
  PRODUCTION 10
  CONSUMPTION OF FIBERS/MATERIALS 12
  PRODUCT SHIPMENTS 14
  PRODUCER PRICE LEVELS 22
  FOREIGN TRADE 23

AT THE RETAIL LEVEL:

  THE POTENTIAL MARKET 25
  RETAIL SALES 27
  RETAIL MERCHANDISING & OPERATING RESULTS 30
  RETAIL ADVERTISING 32
  BUYING HABITS 33

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing inforamtion for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1986 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved

Standard Book Number: 87005-553-4

Printed in the United States of America

HOSIERY/LEGWEAR
(Men's, Women's and Children's)

Market Trends

The hosiery business continues to register gains, continuing the revival which started in 1983. However, the proliferation of fashion elements in hosiery, the wide diversity of products offered as a result of technical developments in yarns and blend levels, and in finishing processes, have stepped up the competition. Over-production continues to be a growing problem, aggravated by the development of high speed, high-tech manufacturing equipment, plus expansion of imports. This is leading to consolidations within the industry.

Frequent changes in lines have become necessary to maintain that competitive edge and fashion excitement. Fast changes in fashion, particularly for women, but in hosiery for men, boys and girls, too has stepped up competition at the retail level. Department and specialty stores generally have held on to their niche in upscale fashion hosiery, but to an increasing extent these stores are meeting head-on competition from large discounters. A survey by American Enka indicated that more than one in four women buys her sheer hosiery at discounters and these stores are expanding their brand and style selections. The pressure is on department and specialty stores to meet this competition with a wider assortment in terms of hosiery types, fashion features and colors, as well as sizes.

Another tactic in the competitive battle has been the development of designer labels and also of private labels by department stores and upscale specialty stores. Women, in general, tend to be loyal to hosiery brands and it is hoped to build a strong following for the store label. Some large discounters, too, have developed private brands in women's hosiery.

In the casual hosiery area, women and girls have been turning away from knee-highs and are registering a preference for anklets. Sport socks, too, have maintained strength. In men's hosiery, tube socks, especially those sold in multipacks, have registered sales gains. The biggest fashion element in men's casual hosiery has been toward argyles, rugby stripes, and colors; and this has carried over to boys' hosiery.

With a continued interest in fitness and leisure wear, sales of dancewear, tights and leotards have been maintained at good levels, particularly in department stores. Most of these stores sell these items in their hosiery departments; although some stores have separate exercisewear departments. Sales of women's leotards have been reported close to $300 million in annual volume.

AT THE MANUFACTURER LEVEL

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Department of Commerce, Census Bureau. Findings on the most recent census, covering 1982, were recently released, as well as results of the 1983 annual survey of manufactures. An annual survey is undertaken each year in the intercensal period to provide estimates on key measurements of manufacturing activity.

The number of mills operating in hosiery industry classifications in 1983 (593) registered a decline of 5.3% compared with 1982 (626). Industry shipments and miscellaneous receipts, however, rose 11.5%, to reach $3.2 billion, while value added within the industry's manufacturing process (not including raw materials, supplies, etc.) rose over 20%.

GENERAL INDUSTRY STATISTICS

Hosiery, Total (SIC 2251 & SIC 2252*)

(Dollar figures are in current dollars)

				% Change	
	1983	1982	1977	1983/1982	1982/1977
Number of companies	na	na	528**	—	—
Number of mills	593	626	615	- 5.3%	+ 1.8%
Number with 20 or more employees	393	381	376	- 3.1	+ 1.3
Employees, total (thous.)	64.4	62.8	58.8	+ 2.5	+ 6.8
Production workers (thous.)	57.9	55.5	52.8	+ 4.3	+ 5.1
Payroll (mil. $)	$ 729.0	$ 637.6	$ 410.0	+ 14.3	+ 55.5
Value added by manufacture# (mil. $)	1,674.6	1,394.7	858.5	+ 20.1	+ 62.4
Value of industry shipments## (mil. $)	3,183.4	2,854.7	1,792.5	+ 11.5	+ 59.2
Capital expenditures, new (mil. $)	52.7	57.4	31.4	- 8.2	+ 82.8

Women's Hosiery, Including Tights (Except Socks) (SIC 2251*)

				% Change	
	1983	1982	1977	1983/1982	1982/1977
Number of companies	na	180	176	—	+ 1.7%
Number of mills	182	206	200	- 11.7%	+ 3.0
Number with 20 or more employees	125	118	119	+ 5.9	- 0.8
Employees, total (thous.)	30.8	30.2	26.6	+ 2.0	+ 13.5
Production workers (thous.)	27.5	26.7	23.8	+ 3.0	+ 12.2
Payroll (mil. $)	$ 354.5	$ 311.1	$ 191.3	+ 14.0	+ 62.6
Value added by manufacture# (mil. $)	903.0	777.4	457.0	+ 16.2	+ 70.1
Value of industry shipments## (mil. $)	1,566.9	1,411.3	871.2	+ 11.0	+ 62.0
Capital expenditures, new (mil. $)	26.7	26.0	16.6	+ 0.8	+ 56.6

Hosiery, n.e.c (SIC 2252*)

				% Change	
	1983	1982	1977	1983/1982	1982/1977
Number of companies	na	376	382	—	- 1.6%
Number of mills	411	420	415	- 2.1%	+ 1.2
Number with 20 or more employees	268	263	257	+ 1.9	+ 2.3
Employees, total (thous.)	33.6	32.6	32.2	+ 3.1	+ 1.2
Production workers (thous.)	30.4	28.8	29.0	+ 5.6	+ 0.7
Payroll (mil. $)	$ 374.5	$ 326.5	$ 218.7	+ 14.7	+ 49.3
Value added by manufacture# (mil. $)	771.6	617.3	401.5	+ 25.0	+ 53.7
Value of industry shipments## (mil. $)	1,616.5	1,443.4	921.3	+ 12.0	+ 56.7
Capital expenditures, new (mil. $)	26.5	31.4	14.8	- 15.6	+112.2

na not available
n.e.c. not elsewhere classified

(footnotes continued)

(footnotes from previous table continued)

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC) determined by the principal product made. The hosiery classifications comprise all mills primarily engaged in knitting, dyeing or finishing hosiery. SIC 2251 covers mills making women's full-length and knee-length seamless and full-fashioned hosiery, pantyhose and tights.

SIC 2252 covers mills engaged in knitting, dyeing or finishing infants' and children's hosiery, men's and boys' hosiery, socks, slipper socks and all other types of hosiery not included in SIC 2251.

** Represents the 1977 enterprise industry category (22B). (See 1977 Enterprise Statistics, U.S. Bureau of the Census ES 77-1). This information is not yet available for 1982. (Note: 4 digit SIC counts on companies are not additive as some companies are in both industry classifications).

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by other manufacturers, and is for most purposes the best value measure of individual industries.

## Value of industry shipments includes receipts for contract work and miscellaneous receipts as well as the value of shipments of both primary products and secondary products made by manufacturers in these industries. The value of primary product shipments (hosiery), alone--plus the value of shipments of hosiery by mills classified in other industries who make hosiery as secondary products--is covered in this section on PRODUCT SHIPMENTS.

Source: U.S. Bureau of the Census, 1982 Census of Manufactures; 1983 Annual Survey of Manufactures (Data on number of mills in 1983, are from County Business Patterns).

On a current basis, the National Association of Hosiery Manufacturers (NAHM) Charlotte, N.C., compiles statistical information on the hosiery industry based on reports received regularly from knitting mills producing a majority of all the types of hosiery made in the United States. These reports reflect the trends which are the important guides to the hosiery industry and its market.

Added to the amounts actually reported are estimates representing the balance of the industry's activity, to arrive at industry-wide data. The NAHM figures do not include non-knitting companies, such as commercial dyers and finishers, converters, etc.

Under the classification system used by the NAHM, there was a total of 297 companies producing hosiery, (as described) in 1985. This was the largest number reported since 1981 (302), but compared with a count of 357 companies reported 10 years ago (1975). A total of 411 individual hosiery plants or mills was reported for 1985. This compares with 474 plants counted in 1975.

GENERAL INDUSTRY STATISTICS

Number of Hosiery Companies, 1982-1985
(As of end of year)

		Women's			All Other**		
Year	Total	Total	North***	South	Total	North***	South
1985	297	87	19	68	215	17	198
1984	283	89	21	68	198	13	185
1983	292	92	22	70	207	13	194
1982	295	92	22	70	210	13	197

Number of Hosiery Mills (Plants), 1982-1985
(As of end of year)

		Women's			All Other**		
Year	Total	Total	North***	South	Total	North***	South
1985	411	146	23	123	267	21	246
1984	413	149	25	124	266	21	245
1983	415	146	25	121	269	22	247
1982	417	146	25	121	271	22	249

* Covers hosiery, pantyhose, socks, etc., knit on 300 needles or more for women and girls, size 7 and up. (Some companies are included in both data designated * and **).

** Covers hosiery knit on less than 300 needles for infants and children (size 3-8 1/2), for girls, boys and women (size 8-11); for men (size 10 and up).

***North includes the Midwest and Far West.

Source: National Association of Hosiery Manufacturers, 1985 Hosiery Statistics.

Employment & Earnings

Employment levels are holding up better in women's hosiery mills than noted in reports on other mills. As of February 1986, total employment in women's hosiery mills averaged 33,300. This compares with 32,100 in February 1985. However, it is well below the peak monthly average of 35,500 reported in 1974.

In other types of hosiery mills, mainly men's, average employment in February 1986 stood at 33,000, compared with 33,200 in the same month a year earlier. The peak for these mills was in 1977, when employment averaged 34,500.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in the Hosiery Industry, 1983-1985
(Annual Averages)

	Women's Hosiery, Except Socks (SIC 2251*)			Hosiery, n.e.c (SIC 2252*)		
	1985	1984	1983	1985	1984	1983
All employees (thous.)	32.9	33.3	32.9	33.2	34.7	34.5
Production workers (thous.)	29.4	29.9	29.5	29.6	31.2	31.2
Av. weekly earnings	$235.52	$218.68	$220.40	$213.23	$209.44	$207.04
Av. weekly hours	38.8	37.9	40.0	36.7	37.4	38.2

n.e.c. not elsewhere classified

* See page 3 for definition of the Standard Industrial Classification (SIC) codes.

Source: U.S. Bureau of Labor Statistics

INDUSTRY CONCENTRATION

When the 1977 census of manufactures was compiled by the Census Bureau, it was found that the four largest companies classified in the women's hosiery industry (SIC 2251) accounted for 50% of the total value of industry shipments -- up from 35% in 1972. The 20 largest companies had a 73% share; the 50 largest, 94%. In the "other hosiery" industry classification (SIC 2252), the four largest had a 20% share of industry shipments in 1977; the 20 largest, 46%; the 50 largest, 66%.

Comparable figures for 1982, based on the latest census, have not yet been released by the Bureau. However, some data on concentration can be found in information on single vs. multiunit operations, as well as on employment size of mills.

Of the 180 companies classified in the women's hosiery (except socks) industry (SIC 2251) in 1982, 28 (15.5%) were multiunit companies, operating 54 plants (26% of the total 206 plants in the industry). These 44 companies accounted for 75% of the industry's total employment, 85% of the value added by manufacture within the industry, and almost 83% of the total value of industry shipments. (1982 Census of Manufactures: Type of Organization (MC82-S-5).

INDUSTRY CONCENTRATION

Of the 376 companies classified in the hosiery not-elsewhere-classified industry (SIC 2252), 44 (11.7%) were multiunit companies. These companies operated 88 out of the total 420 plants (21%), had 50.3% of the industry's total employees, accounted for 56% of the total value added by manufacture within the industry, and accounted for almost 56% of the industry's total value of shipments.

Figures on mill employment size from the 1982 census show that in the women's hosiery industry, there were 64 mills with 100 or more employees (31% of the total mills). These mills accounted for 59% of total industry employment, 93% of the total value added by manufacture, and 91% of the value of industry shipments.

Mills in the other hosiery industry classification which had 100 or more employees numbered 100 (23.8% of the total of 420). These big employers accounted for 74% of total industry employment, 78% of the value added by manufacture and 75% of industry shipments.

Hosiery Mills By Employment Size, 1982

	Establishments		Value added by Manufacture		Industry Shipments	
	Number	Percent	Mil.$	Percent	Mil.$	Percent
Women's hosiery, exc. socks, (SIC 2251), total	206	100.0%	$ 777.4	100.0%	$1,411.3	100.0%
By establishment size:						
Number of employees:						
Under 10	61	29.6	5.4	6.9	10.2	0.7
10 - 19	27	13.1	5.9	0.8	14.9	1.1
20 - 49	26	12.6	12.2	1.6	24.9	1.8
50 - 99	27	13.1	29.1	3.7	74.4	5.3
100 - 249	29	14.1	78.2	10.1	205.8	14.6
250 - 499	19	9.2	156.8	20.2	287.2	20.3
500 or more	17	8.3	486.4	62.6	793.9	56.2
Hosiery, n.e.c. (SIC 2252), total	420	100.0%	$ 617.3	100.0%	$1,443.4	100.0%
By establishment size:						
Number of employees:						
Under 10	98	23.3	6.3	1.0	15.9	1.1
10 - 19	59	14.0	11.8	1.9	30.7	2.1
20 - 49	110	26.2	55.7	9.0	161.4	11.2
50 - 99	53	12.6	60.6	9.8	153.2	10.6
100 - 249	67	16.0	202.9	32.9	468.0	32.4
250 - 499	27	6.4	197.6	32.0	447.5	31.0
500 or more	6	1.4	82.4	13.3	166.7	11.5

n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
MC82-I-22B

INDUSTRY CONCENTRATION

In the annual report County Business Patterns, the Census Bureau has reported comparable figures on employment size of mills and total employment for the year 1983.

Hosiery Mills by Employment Size, 1983

	Women's Hosiery (SIC 2251*)			Hosiery, n.e.c. (SIC 2252*)		
	No. of Mills	% of Mills	% of Employment	No. of Mills	% of Mills	% of Employment
Total establishments	182	100.0%	100.0%	411	100.0%	100.0%
Number by employment size:						
Under 10 employees	40	22.0	0.4	84	20.4	na
10 to 19 employees	27	14.8	1.2	59	14.4	2.5
20 to 49 employees	22	12.1	1.9	119	29.0	11.4
50 to 99 employees	32	17.6	7.0	57	13.9	12.5
100 to 249 employees	26	14.3	14.2	57	13.9	29.9
250 to 499 employees	16	8.8	19.3	28	6.8	na
500 employees or more	19	10.4	55.9	7	1.7	na

na not available
n.e.c. not elsewhere classified
* For definition of SIC codes, see page 3.

Source: U.S. Bureau of the Census,
County Business Patterns 1983

Capacity Utilization Rates

The U.S. Bureau of the Census conducts an annual survey of plant capacity which covers operations in the fourth quarter of the year. Measures on capacity utilization include a rate which is based on plant operators' preferred level of operations, i.e. generally considered to be the rate at which profits will be maximized.

Capacity Utilization Rates in the Hosiery Industry
Fourth Quarters 1981-1984

	Preferred Rate			
	1984	1983	1982	1981
Women's hosiery, exc. socks	83	91	90	86
Hosiery, n.e.c.	83	90	83	82

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census, Current Industrial Reports,
Survey of Plant Capacity, 1984 (MQ-C1(84)1

LOCATION OF THE INDUSTRY

About nine out of 10 mills operating in the hosiery industry are located in the South, and this region accounted for 92.7% of total hosiery production in 1985, compared with 92.2% in 1983, according to the National Association of Hosiery Manufacturers.

North Carolina is the dominant State in the industry. The Association reports that in 1985 North Carolina accounted for well over half of total hosiery production (56.4%) and is particularly important in the output of sheer hosiery for women, accounting for almost 70% of total 1985 production in this classification -- a sharp rise from the States' 45% share in 1981, and 55% in 1982.

The U.S. Census Bureau has reported data on the two major segments of the hosiery industry by States, based on the complete 1982 census of all U.S. manufacturers. According to this source, North Carolina had 56% of the mills producing women's hosiery and these mills accounted for 58.5% of value added in the industry and 64.5% of industry shipments (dollar value) in 1982.

In "other hosiery" classifications, Tennessee accounted for the biggest share of value-added (12.9%) and had a 20% share of industry shipments.

Leading Manufacturing States In the Hosiery Industry, 1982

	Establishments		Value added By Manufacture (Mil. $)	Industry Shipments (Mil.$)
	Total	With 20+ Employees		
Women's hosiery, exc. socks, total	206	118	$ 777.4	$1,411.3
Leading states:				
North Carolina	116	81	454.6	910.9
Pennsylvania	15	8	4.9	9.9
Leading states, total	131	89	459.5	920.8
Leading states, percent of total	63.6%	75.4%	59.1%	65.3%

(continued)

LOCATION OF THE INDUSTRY

Leading States In the Hosiery Industry, 1982
(continued)

	Establishments Total	Establishments With 20+ Employees	Value added By Manufacture (Mil. $)	Industry Shipments (Mil.$)
Hosiery, n.e.c., total	420	263	617.3	$1,443.4
Leading states:				
North Carolina	274	171	366.5	869.6
Alabama	41	24	33.8	91.4
Tennessee	32	25	79.4	174.5
Georgia	19	12	33.8	88.8
Leading states, total	366	232	513.5	1,224.3
Leading states, percent of total	87.1%	88.2%	83.2%	84.8%

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982 (MC82-1-22B)

NATIONAL ADVERTISING

An analysis of spending for space and time in major media by the hosiery industry shows a total of $88.8 million in 1984, up 36.3% over the total of $65.1 million reported for the year 1980.

Network television accounted for 65% of the 1984 total compared with 71% in 1980. The combined share of network and spot TV advertising in 1984 represented 75% of the 1984 total (down from 78% in 1980), and hosiery is the biggest TV advertiser in the apparel category. Over 20 brands were advertised on TV last year compared with just one, Hanes, a few years ago.

The biggest TV advertiser in 1984 was Consolidated Foods Corp. (including Hanes, L'eggs and Underall divisions). This advertiser spent $47.7 million on hosiery advertising in TV (time costs), 22% more than in 1983. The second biggest spender was Gulf & Western (including Burlington and No Nonsense divisions). This company spent $18.3 million for TV time advertising hosiery, up 22% compared with 1983.

Originally, TV commercials on hosiery concentrated on the packaged-goods approach suitable for the heavy distribution in drug stores, supermarkets and discount stores. The emphasis was on price and convenience, rather than fashion. New developments in fashion appeal, and technical improvements involving fit, comfort and wear, have changed this approach. TV hosiery advertising has become much more glamorous, as lines expand and competition between brands grows sharper.

NATIONAL ADVERTISING

Expenditures for Space/Time in Major Media By Hosiery Manufacturers
(Thousands of dollars)

	1984	1980	% Change 1984/1980
6-Media total	$88,783.0	$65,131.1	+ 36.3%
Consumer magazines	19,108.6	13,196.8	+ 44.8
Newspaper supplements	1,084.4	522.8	+107.4
Network television	57,975.5	46,440.0	+ 24.8
Spot television	8,836.3	4,170.8	+111.9
Network radio	1,773.7	767.7	+131.0
Outdoor	4.5	33.0	- 86.4

Source: Leading National Advertisers

PRODUCTION

The National Association of Hosiery Manufacturers, Inc., Charlotte, N.C., compiles hosiery industry information based on reports from manufacturers and estimates covering non-reporting hosiery producers.

Production of hosiery by U.S. mills reached a peak of 310.1 million dozen pairs in 1981, then as the recession got underway declined to 281.8 million dozen pairs in 1982. Production rebounded in 1983, reaching 309.4 million dozen pairs, but declined to 307.5 dozen pairs in 1984, then fell to 303.3 million dozen pairs in 1985.

Of total hosiery production, women's pantyhose represented 37.7% in 1985, and accounted for 71.3% of the total women's and girls' hosiery category, up from 70.3% in 1984. The chief type -- sheer pantyhose, which accounted for 51% of 1985 production of pantyhose -- registered a drop of almost 14% in output compared with 1984. Elastomer types, on the other hand, which held a 43% share of the 1985 pantyhose total, registered a gain of 24.3% in production compared with the 1984 total. Control-tops -- which at 21.9 million dozen pairs represented 44.6% of women's elastomer hosiery production -- gained 5.6% compared with 1984.

Production of men's hosiery (22.2% of the 1985 hosiery total) was down 1.4% compared with 1984, with anklet production down 3.7%; midcalf and crew socks down 0.4%; knee-highs, down 0.7%.

Production of Hosiery, 1982-1985
(Dozens of pairs in thousands)

	1985	1984	1983	1982	% Change 1985/84
Total hosiery & major types					
Hosiery, total	303,350	307,490	309,420	281,768	- 1.3%
Infants' & children's, sizes 3 - 8½	26,353	27,191	27,041	25,764	- 3.1
Footsocks	699	781	620	618	-10.5
Anklets	14,200	15,356	16,522	16,055	- 7.5
Mid-calf/crew	5,721	3,603	1,396	1,446	+58.8
Knee-highs	4,579	5,841	6,993	6,653	-21.6
Waist-highs	1,129	1,539	1,471	992	-26.6
Stockings	25	71	39	*	-64.8
Girls', boys', women's, sizes 8-11 (knit on less than 300 needles) total	49,287	49,876	54,223	46,324	- 1.2
Footsocks	6,127	5,154	5,830	6,503	+18.9
Cushion	5,403	4,577	5,424	6,121	+18.0
Non-cushion	724	577	406	382	+25.5
Anklets	19,397	19,500	17,285	11,875	- 0.5
Cushion	7,967	8,821	7,178	4,321	- 9.6
Non-cushion	11,430	10,688	10,107	7,554	+ 6.9
Mid-calf/crew	6,238	4,516	4,858	3,984	+38.1
Cushion	4,141	2,752	3,732	2,982	+50.5
Non-cushion	2,097	1,764	1,126	1,002	+18.9
Knee-highs	17,006	20,175	25,654	23,403	-15.7
Cushion	7,549	8,094	9,966	6,958	- 6.7
Non-cushion	9,457	12,081	15,688	16,445	-21.7
Stockings	60	97	48	79	-38.1
Waist-highs (tights) size 7 & up	459	434	548	480	+ 5.8
Women's & girls' hosiery (footsocks, pantyhose, stockings, tights, etc.) (knit on 300 needles or more) total	160,326	162,051	161,677	147,678	- 1.1
Pantyhose	114,267	113,882	116,650	105,076	- 0.3
Sheer	57,947	67,147	64,048	58,491	-13.7
Opaque	5,245	5,437	3,463	2,399	- 3.5
Elastomer	49,011	39,428*	47,622	43,226	+24.3
Other (tights, size 7 & up)	2,064	1,870	1,427	960	+10.4
Stockings	3,832	4,204	4,854	4,477	- 8.8
Non-stretch	1,216	1,276	1,514	1,463	- 4.7
Stretch	2,209	2,468	2,712	2,434	-10.5
Support	358	412	570	540	-13.1
Other	49	48	58	40	+ 2.1
Other women's hosiery	42,227	43,965	40,263	38,125	- 4.0
Footsocks	330	238	369	372	+38.7
Anklets	635	685	791	756	- 7.3
Knee-highs	41,220	42,952	39,067	39,979	- 4.0
Mid-calf/crew	42	90	36	--	- 53.3

* Believed to be under-reported.

(continued)

Production of Hosiery, 1982-1985
(Dozens of pairs in thousands)
(continued)

Total Hosiery & Major Types	1985	1984	1983	1982	% Change 1985/84
(continued)					
Men's hosiery (size 10 & up) (knit on less than 300 needles)					
total	67,384	68,372	66,479	66,002	- 1.4%
Cushion	35,101	35,284	33,359	31,562	- 0.5
Non-cushion	32,283	33,088	33,120	30,440	- 2.4
Footsocks	959	733	471	352	+30.8
Cushion	716	450	262	144	+59.1
Non-cushion	243	283	209	208	-14.1
Anklets	25,083	26,047	26,721	26,723	- 3.7
Cushion	4,461	4,748	5,008	5,882	- 6.0
Non-cushion	20,622	21,299	21,713	20,841	- 3.2
Mid-calf/crew	17,583	17,657	17,746	17,274	- 0.4
Cushion	9,775	9,954	10,232	11,132	- 1.8
Non-cushion	7,808	7,703	7,514	6,142	+ 1.4
Knee-highs	23,759	23,935	21,541	17,653	- 0.7
Cushion	20,149	20,132	17,857	14,404	+ 0.1
Non-cushion	3,610	3,803	3,684	3,249	- 5.1

Source: National Association of Hosiery Manufacturers, 1985 Hosiery Statistics.

CONSUMPTION OF FIBERS/MATERIALS

Man-mades account for the major share of fibers consumed in the hosiery industry, representing over 85% of total fiber consumption in 1984. There is a variation in the level, and in the type of man-made fiber consumed by hosiery type, however. In women's hosiery, most of which fall in the pantyhose category, nylon accounts for almost all of the fiber poundage consumed. In men's hosiery, acrylic fiber dominates, representing a total of some 62 million pounds used in men's socks, or about 70% of total fibers used. High bulk acrylic is used extensively in athletic socks. In April 1986, Monsanto announced the introduction of a new highbulk acrylic fiber for the men's sock market, Acrilan II HI-Bulk, which is said to offer improved dyeability and wear characteristics. Natural fibers (cotton and wool) have a niche in the athletic sock market, as well as accounting for about 30% of total fiber consumption in men's hosiery.

Fiber/yarn producers and hosiery mills have greatly stepped up efforts to work with retailers in providing fashion excitement in hosiery through innovations in fiber treatments, development of new blends and new yarn processing to provide a natural-fiber hand as well as through the development of new colors, patterns and ornamentations.

CONSUMPTION OF FIBERS/MATERIALS

Trade sources report a fast-growing premium pantyhose market as a result of the improved silky, sheer Lycra spandex fiber produced by DuPont, which has led major hosiery producers to launch new sheer lines. Nylon and Lycra spandex sheer pantyhose account for nearly 10% of all retail panytyhose sales nationally. That figure is expected to triple by 1988, according to DuPont.

Textile Fibers Consumed in U.S. Production of Hosiery, 1982-1984
(Millions of pounds)

	1984	1983	1982	% Change 1984/1983
Sheer hosiery, total reported*	86.0	80.7	71.6	+ 6.6%
Man-made, total	82.6	77.2	68.5	+ 7.0
Cotton	3.4	3.5	3.1	- 2.9
Anklets & socks, total**	180.1	195.2	172.9	- 7.7
Man-made, total	131.5	152.6	139.8	-13.8
Cotton	45.2	39.6	30.6	+14.1
Wool	3.4	3.0	2.5	+13.3

* Includes pantyhose, stockings, body stockings, leotards & tights, sheer knee-highs and anklets and support hose.

**Includes footsocks, anklets, half hose, over-the-calf hosiery and non-sheer knee-highs, for all ages and both sexes. Also includes infants' and children's waist highs.

Source: Textile Economics Bureau,
Textile Organon (September 1985)

Information on the value of materials, containers and supplies consumed in the hosiery industry, and to a limited extent quantities consumed, is published by the Census Bureau in the complete census of manufactures conducted every five years. The most recent covers the year 1982.

Materials Consumed, By Kind, In The Hosiery Industry, 1982
(Quality in millions of pounds, cost in millions of dollars)

	Women's Hosiery Except Socks (SIC 2251)		Hosiery, n.e.c. (SIC 2252)	
	Quantity	Delivered Cost	Quantity	Delivered Cost
Total	--	$551.2	--	$734.5
Hosiery in the greige, exc. pantyhose	--	45.6	--	204.9
Pantyhose shipped in the greige	--	67.1	--	--
Cotton yarns	5.6	9.6	50.0	78.4
Nylon spun yarns	7.0	22.0	nr	26.6
Acrylic yarns	6.9	17.8	69.6	146.2
Nylon filament yarns	46.9	173.3	25.8	68.4
Spandex filament yarns	8.1	76.2	2.0	10.7
All other yarns	nr	8.1	25.3	56.3
All other materials, components, parts, containers, etc.	--	131.5	--	143.0

n.e.c. not elsewhere classified.
nr not reported.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures (MC82-1-22B)

PRODUCT SHIPMENTS

Pairs

Detailed information on shipments of hosiery by type, in terms of pairs, is compiled on a current basis by the National Association of Hosiery Manufacturers, Charlotte, N.C., based on reports from knitting mills producing a majority of all types of hosiery made in the U.S., plus careful estimates representing the balance of the industry's activity.

Women's & Girls' Hosiery (Knit on 300 Needles or More)

As reported by the NAHM, this is the biggest single classification of hosiery -- totaling 164.9 million dozen pairs in 1985, and representing more than half (53.4%) of all hosiery shipped in 1985. This category includes pantyhose, stockings, tights, socks, etc. Pantyhose accounting for 69.5% of the women's and girls hosiery (knit on 300 needles or more) in 1985 and registered a 5.9% gain in shipments compared with 1982. Opaques have registered the fastest growth.

In 1984, the NAHM released findings in a survey (called the Delphi survey), conducted by Kurt Salmon Associates which developed projections on hosiery shipments to the year 2005, according to survey participants. Annual volume in women's hosiery is expected to grow to 175 million dozen pairs by the year 2005, according to survey participants. This is out of a projected total for all types of hosiery and legwear, amounting to 342 million dozen pairs.

In 1985, knee-highs continued their steady climb in popularity among women while socks and anklets registered a decline.

Men's Hosiery (Size 10 & Up Knit on less than 300 Needles)

Shipments of this classification of men's hosiery totaled 67.9 million dozen pairs in 1985, which was 3.5% below the 1985 total, 8.2% higher than in 1982, and represented about 22% of hosiery shipments of all types last year.

The Delphi survey, referred to above, projected a total of about 71 million dozen pairs of men's hosiery would be shipped in the year 2005. The trend to longer lengths and crew socks was expected to accelerate.

Sizes 8-11, Girls', Boys', Women's

This classification includes stockings knit on less than 300 needles and waist-highs (tights) for all sizes 7 and up knit on less than 300 needles. Shipments in 1985 totaled about 50 million dozen pairs, representing 16.2% of the hosiery industry total.

The NAHM's Delphi survey showed projected growth to 62 million dozen pairs by year 2005.

Sizes 3 - 8 1/2, Infants', Children's

This classification includes styles whose size range from 3 - 6½, 5 - 8½, 7 - 10. It includes waist-highs (tights) with a midpoint size 6 or less knit on less than 300 needles. In 1985, shipments totaled 25.8 million dozen pairs, up 6.9% compared with 1982. The Delphi survey projected the total for year 2005 at 32 million pairs in this classification.

PRODUCT SHIPMENTS

Pairs

Hosiery Shipments, 1982-1985

(Dozens of pairs in thousands)

	1985	1984	1983	1982	% Change 1985/1984
Hosiery, total	308,660	na	308,079	288,704	+ 6.9%
Infants' & children's, sizes 3 - 8½	25,808	26,867	24,482	24,825	+ 4.0
Footsocks	686	740	546	691	- 0.7
Anklets	14,335	15,350	15,002	15,207	- 5.7
Mid-calf/crew	5,257	3,459	1,474	1,559	+ 237.2
Knee-highs	4,433	5,777	6,218	6,459	- 31.4
Waist-highs (tights)	1,069	1,475	1,207	908	+ 17.7
Stockings	28	66	35	1	+2700.0
Women's & girls' hosiery (footsocks, pantyhose, stockings, tights, etc.) (knit on 300 needles or more, total	164,931	na	164,106	153,176	+ 7.7
Pantyhose	114,681	na	117,788	108,242	+ 5.9
Sheer	59,381	64,962	65,694	60,721	- 2.2
Opaque	6,045	4,674	3,320	1,833	+ 229.8
Elastomer (spandex-type yarn in leg ankle/or panty)	47,352	na	47,480	44,858	+ 5.6
Other (including tights)	1,903	1,672	1,294	830	+ 129.3
Stockings	3,654	4,199	4,599	4,638	- 21.2
Non-stretch	1,109	1,355	1,460	1,752	- 36.7
Stretch	2,139	2,431	2,576	2,374	- 9.9
Support	322	334	490	460	- 30.0
Other	84	79	73	52	+ 61.5
Other women's hosiery	46,596	45,970	41,719	40,296	+ 15.6
Footsocks	289	352	473	492	- 41.3
Anklets	609	671	865	870	- 30.0
Knee-highs	45,638	44,882	40,348	38,916	+ 17.3
Mid-calf/crew	60	65	33	18	+ 233.3
Girls', boys', women's, sizes 8-11 (knit on less than 300 needles) total	50,026	51,263	52,794	47,980	+ 4.3
Footsocks	6,252	5,254	5,789	6,814	- 8.2
Cushion	5,281	4,718	5,361	6,398	- 17.5
Non-cushion	971	536	428	416	+ 133.4
Anklets	19,665	19,894	16,609	12,283	+ 60.1
Cushion	7,544	9,199	6,336	4,830	+ 56.2
Non-cushion	12,121	10,650	10,273	7,453	+ 62.6
Mid-calf/crew	5,682	4,267	4,906	4,548	+ 24.9
Cushion	3,683	2,557	3,736	3,493	+ 5.4
Non-cushion	1,999	1,710	1,170	1,055	+ 89.5
Knee-highs	17,889	21,258	24,906	23,776	+ 24.8
Cushion	7,242	7,806	9,008	7,082	+ 2.3
Non-cushion	10,647	13,452	15,899	16,694	- 36.2
Stockings (women's)	77	125	46	67	+ 14.9
Waist-highs (women's tights)	461	510	537	492	- 6.3

(continued)

PRODUCT SHIPMENTS

Pairs

Estimated Hosiery Shipments, 1982-1985
(Dozens of pairs in thousands)
(continued)

	1985	1984	1983	1982	% Change 1985/1984
Men's hosiery (size 10 & up) (knit on less than 300 needles)					
total	67,895	70,393	66,697	62,723	+ 8.2%
Cushion	34,544	34,543	32,669	31,516	+ 9.6
Non-cushion	33,351	35,850	34,028	31,207	+ 6.9
Footsocks	782	560	327	291	+ 168.7
Cushion	584	310	160	133	+ 339.1
Non-cushion	198	250	167	208	+ 25.3
Anklets	25,386	27,834	26,899	26,376	- 7.3
Cushion	4,740	5,432	5,340	6,449	- 26.5
Non-cushion	20,646	22,402	21,559	20,927	- 1.3
Mid-calf/crew	18,228	17,970	18,488	17,445	+ 4.5
Cushion	9,633	9,183	9,875	10,899	- 11.6
Non-cushion	8,595	8,787	8,613	6,566	+ 30.9
Knee-highs	23,499	24,029	20,983	17,611	+ 33.4
Cushion	19,587	19,618	17,294	14,035	+ 39.6
Non-cushion	3,912	4,411	3,689	3,576	+ 9.4

na not available
* Less than 0.1%.
** According to a special NAHM survey covering June shipments, girls' and women's hosiery represented about 61% of hosiery size 8-11, knit on less than 300 needles, boys', 39% in 1985.

Source: National Association of Hosiery Manufacturers, Hosiery Statistics.

The combined total of hosiery knit on 300 needles or more and under 300 needles (size 8-11), shows total shipments of specific types of women's and girls' hosiery, and boys' hosiery as follows in 1985, based on an NAHM survey covering shipments in the month of June where indicated (*).

PRODUCT SHIPMENTS

Pairs

Estimated Shipments of Specified Types of Hosiery, 1985

	Dozens of Pairs (000)
Women's & girls', specified types, total	79,088
Knee-highs, total	52,257
300 needles or more	45,638
Less than 300 needles*	6,619
Footsocks	6,541
300 needles or more	289
Less than 300 needles*	6,252
Anklets	19,094
300 needles or more	609
Less than 300 needles*	18,485
Mid-calf/crew	1,196
300 needles or more	60
Less than 300 needles*	1,136
Boys', (less than 300 needles)*	16,994
Knee-highs	11,270
Mid-calf/crew	4,545
Anklets	1,179
Footsocks	--

* See page 16.

Seasonal Pattern in Hosiery Shipments
Percent of Unit Shipments By Months, 1985

	Infants'/ Children's	Girls'/Boys'/Women's (Sizes 8-11)	Women's/Girls' (300 Needles +)	Men's (Sizes 10-13)
Total	100.0%	100.0%	100.0%	100.0%
January	7.9	7.4	8.3	6.9
February	8.5	8.0	7.9	7.2
March	8.5	8.6	8.1	7.2
April	7.8	6.6	8.8	6.5
May	8.8	8.4	8.3	8.3
June	10.6	10.8	8.0	9.5
July	9.6	8.7	9.9	9.2
August	7.3	8.1	7.1	8.5
September	8.4	9.0	7.6	8.0
October	8.7	10.1	9.7	9.9
November	7.5	10.1	8.4	11.3
December	6.3	6.0	8.0	7.4

Source: Based on National Association of Hosiery Manufacturers' reports.

PRODUCT SHIPMENTS

Value

As opposed to industry shipments, reported in the section on GENERAL INDUSTRY STATISTICS, product shipments cover the value of hosiery shipped by all producers, including all types of knitting mills. Estimates issued by the Census Bureau, based on the 1983 survey of manufactures, placed the total value of all hosiery shipped that year at $3,085 million, representing a gain of 12.2% over the $2,749.8 million reported in the 1982 census of manufactures.

Value of Shipments of Hosiery, By All Producers: 1977, 1982, 1983
(Millions of dollars)

	1983	1982	1977	% Change 1983/82
Hosiery, total	$3,085.0	$2,749.8	$1,712.7	+ 12.2%
Women's hosiery, except socks (SIC 2251)	1,568.4	1,425.3	819.1	+ 10.0
Finished seamless hosiery, full-length (except pantyhose)	419.9	353.4	723.4	+ 18.8
Finished pantyhose	1,009.1	943.2		+ 7.0
Shipped in greige	94.6	85.6	58.4	+ 10.5
Type not specified	44.8	43.1	37.3	+ 3.9
Hosiery, except women's full-length & knee-length hosiery (SIC 2252), total	1,516.6	1,324.5	893.6	+ 14.5
Men's finished seamless (sizes 10 & up)	731.2	655.0	464.6	+ 11.6
All other seamless (finished)	523.8	452.1	274.3	+ 15.9
Seamless hosiery shpped in the greige except women's full- & knee-length	187.3	155.6	93.5	+ 20.4
Type not specified	74.2	61.9	61.2	+ 19.9

Source: U.S. Bureau of the Census,
1982 Census of Manufactures (MC82-1-22B)

Further details on shipments by product are found in the census of manufactures reports. Based on these reports, it is estimated that the $3.1 billion in manufacturers' shipments in 1983 were distributed as follows:

Estimated Value of Hosiery Shipments By Type; 1983
(Value in millions of dollars)

	Millions of $	Percent
Hosiery, total	$ 3,085.0	100.0%
Women's	1,721.4	55.8
Men's	907.0	29.4
Boys', girls'	283.8	9.2
Infants', children's	172.8	5.6

PRODUCT SHIPMENTS

Findings on value of shipments, as well as pairs shipped where available, from the 1982 and 1977 census of manufactures were reported as shown below.

Quantity & Value of Shipments Of Women's Hosiery (SIC 2251): 1977, 1982

	Quantity (Millions of Doz. Pairs)			Value (Millions of Dollars)		
	1982	1977	% Change 1982/1977	1982	1977	% Change 1982/1977
Women's & misses' hosiery (SIC 2251), total*	—	—	—	$1,425.3	$819.1	+ 74.0%
Finished seamless hosiery, full- & knee-length, exc. pantyhose	—	—	—	353.4	(D)	—
Misses finished knee-length socks, sizes 8-11	13.8	2.1	+ 557.1	112.5	14.3	+686.7
Seamless stockings, full- & knee-length finished	—	—	—	240.9	178.6	+ 34.9
Knee-length, stretch & nonstretch	31.3	28.4	+ 10.7	141.6	100.0	+ 41.6
30 denier, stretch & nonstretch	7.9	8.3	- 4.8	56.9	49.6	+ 14.7
Full length, nonfancy, support	0.5	1.1	- 54.5	6.5	10.0	- 35.0
All other finished seamless hosiery	1.7	(D)	—	27.8	(D)	—
Finished pantyhose	—	—	—	943.2	(D)	—
Under 30 denier, sheer stretch	41.7	50.0	- 16.6	313.4	402.5	- 22.1
30 denier or heavier, opaque stretch	14.5	8.3	+ 74.6	208.9	107.6	+ 94.1
Elastomer:						
Control top	17.6	(D)	—	187.6	(D)	—
Leg support	12.1			216.7		
All other miscellaneous sheers	1.2			13.7		
Hosiery shipped in the greige, total	—	—	—	85.6	(D)	—
Full-fashioned & seamless, full & knee length, exc. pantyhose	10.9	(D)	—	27.5	(D)	—
Pantyhose	11.7	4.5	+ 2.6	57.7	22.4	+157.6
Hosiery, n.s.k.	—	—	—	0.4	5.1	- 92.2
All other hosiery, n.s.k.	—	—	—	43.1	37.3	+ 15.5

* See page 3 for definition of SIC code.
(D) Withheld to avoid disclosure
n.s.k. not specified by kind

Source: U.S. Bureau of the Census,
Census of Manufacutures, 1982
MC82-I-22B

PRODUCT SHIPMENTS

Value

Quantity & Value of Shipments of Hosiery (SIC 2252): 1977, 1982

	Quantity (Millions of Doz. Pairs)			Value (Millions of Dollars)		
	1982	1977	% Change 1982/1977	1982	1977	% Change 1982/1977
Hosiery (SIC 2252), total*	—	—	—	$1,324.5	$893.6	+ 48.2%
Men's finished seamless	—	—	—	655.0	464.6	+ 41.0
Anklets, natural fiber	16.7	25.1	- 33.5%	139.7	136.3	+ 2.5
Anklets, manmade fiber	34.9	38.1	- 8.4	295.1	222.0	+ 32.9
Mid-calf, natural fiber	4.3	7.4	+ 47.3	37.3	43.9	+102.1
Mid-calf, manmade fiber	6.6			51.4		
Knee, natural fiber	3.1			33.2		
Knee, manmade fiber	7.4	9.7	+ 41.2	56.6	59.1	+104.4
All other, incl. footsocks	3.2			31.0		
All other finished seamless	—	—	—	452.1	274.3	+ 64.8
Women's, misses', girls' & boys' (sizes 8-11):						
Anklets, natural fiber	11.5	8.7	+ 32.1	72.2	37.4	+ 93.0
Anklets, manmade fiber	17.3	21.8	- 20.6	122.5	83.8	+ 46.2
Boys' & girls' exc. anklets:						
Knee, natural fibers	2.0	2.2	- 9.1	14.1	10.1	+ 39.6
Knee, manmade fibers	8.9	10.2	- 12.7	65.0	51.4	- 26.5
All other	2.8	1.5	+ 86.6	31.0	9.6	+222.9
Infants' & chilren's (sizes 3- 8 1/2):						
Anklets, natural fiber	6.2	6.8	- 8.8	33.3	26.9	+ 23.8
Anklets, manmade fiber	10.1	10.6	- 4.7	54.3	42.5	+ 27.8
Knee	3.7	0.8	+362.5	21.4	4.1	+422.0
All other	4.6	0.6	+666.6	31.0	3.2	+868.8
All other finished seamless	—	—	—	7.2	5.3	+ 35.8
Seamless hosiery, shipped in the greige, exc. women's full & knee length, total	—	—	—	155.6	93.5	+ 66.4
Men's, all types	21.1	16.1	+ 31.1	113.2	62.0	+ 82.5
Women's, misses', girls' & boys'	6.7	5.8	+ 15.5	27.2	17.4	+ 56.3
Children's & infants'	3.2	5.1	- 37.3	13.3	13.4	- 0.7
Seamless hosiery, n.s.k.	—	—	—	1.9	0.7	+171.4
Hosiery, n.s.k., total	—	—	—	61.9	61.2	+ 1.1

* See page 3 for definition of SIC codes.
(D) Withheld to avoid disclosure
n.s.k. not specified by kind

Source: U.S. Bureau of the Census,
Census of Manufacutures, 1982
MC82-I-22B

PRODUCT SHIPMENTS

Value: Athletic Hosiery & Bodywear

Estimated Sales of Athletic Socks by Leading Manufacturers, 1983, 1984
(Millions of dollars)

	1984	1983
Adams Millis*	$100.0	$45.0
Burlington**	37.0	37.0
Russel National#	36.4	34.0
Wigwam	24.0	22.0
Interwoven**	21.0	21.0
Neuville-Mobile##	17.0	15.0
Ballston	14.0	15.0
Fox River	13.6	6.5
Twin City	13.0	15.0
Ridgeview	12.0	10.5

* Includes Socksmith, ABC Sports, Sporttime and private label

** Interwoven and Burlington are divisions of Kayser Roth. Burlington's figure includes Equipe and private label.

# Includes private label.

## Includes Spalding and private label.

Source: SportStyle, June 17, 1985

Estimated Sales of Bodywear/Exercise Apparel By Leading Manufacturers, 1983, 1984
(Millions of dollars)

	1984	1983
Danskin	$ 75.0#	110.0
Capezio*	50.0	50.0
Flexatard	20.0	19.0
Carushka	12.0	10.0
Tickets	9.0	6.0
Alba-Waldensian**	7.6	10.7
Marika	7.5	5.0
Softouch	7.3	5.0
Stevi Brooks	3.7	3.9

* Includes footwear sales

** Includes hosiery sales

# Danskin's volume in leotards, etc., in 1985 has been reported at $120 million. An influx of California fashion bodywear has also come into the market.

PRODUCT SHIPMENTS

Value: Leading States

Value of Hosiery Shipments By Leading States: 1982
(Millions of dollars)

	Amount	Percent
Women's hosiery		
Finished seamless, except pantyhose (including full-length & knee-length)	$353.4	100.0
North Carolina	268.7	76.0
Pennsylvania	9.2	2.6
Tennessee	22.9	6.5
Finished pantyhose, total	943.2	100.0
North Carolina	518.7	55.0
Virginia	16.5	1.7
Shipped in the greige, total	85.6	100.0
North Carolina	82.8	96.7
Men's hosiery (sizes 10 or larger)		
Finished seamless, total	655.0	100.0
North Carolina	390.5	59.6
Tennessee	79.4	12.1
Pennsylvania	48.3	7.4
Georgia	40.5	6.2
Alabama	23.9	3.6
Virginia	11.4	1.7
Other hosiery		
All other finished seamless hosiery, total	452.1	100.0
North Carolina	259.8	57.5
Tennessee	78.7	17.4
Seamless hosiery shipped in the griege, except women's full-length & knee-length	155.6	100.0
North Carolina	100.7	64.7
Alabama	29.7	19.1
Georgia	12.5	8.0

Source: U.S. Bureau of the Census, 1982 Census of Manufactures
MC82-I-22B

PRODUCER PRICE LEVELS

Prices at the factory level have been edging up. As of January 1986, according to the Bureau of Labor Statistics, the average price of women's pantyhose and sheer knee-highs was about 1% higher than in the same month a year ago, and over the average in 1984. Factory prices for men's finished hosiery in January 1986 were also about 1% above the level a year ago, and 1.8% above the 1984 average.

PRODUCER PRICE LEVELS

Producer (Factory) Price Indexes
(June 1984=100)

	1984	January 1985	January 1986
Women's hosiery knit on 300 needles or more & knee-highs	100.3	100.5	101.2
Hosiery n.e.c.	nr	100.6	100.8
Men's finished hosiery	99.8	100.6	101.6

n.e.c. not elsewhere classified
nr not reported

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

The strong favorable balance of trade which the U.S. has enjoyed in hosiery was upset in 1984 and 1985 due to the strong value of the U.S. dollar against foreign currencies and to the computer technology available in the Orient which is not available in the U.S. In 1985, according to the National Association of Hosiery Manufacturers, based on U.S. Census Bureau reports, the value of U.S. exports amounted to $27.7 million as compared to imports valued at $66.0 million. In 1985, U.S. hosiery exports were valued at $42.6 million; imports at $23.0 million.

The growing inroad of imported hosiery is becoming a matter of concern in the industry. Most manufacturers agree that pantyhose and basic casual socks, including sport socks, are fairly well isolated from the tide of imported hosiery because they can be made just as inexpensively here as offshore. However, direct importing of casual novelty socks, as well as patterned knee-highs particularly from the Orient, is on the rise.

U.S. manufacturers who are importing hosiery cited the superior quality of yarns, finishing and dyeing, as well as patterns, particularly in Japanese and Korean goods made in mills with advanced computer techology. Licensing agreements are also a factor in off-shore production of designer and brand name hosiery. A trade source estimated that while imports in 1985 represented only about 2% of hosiery sales in the U.S., the figure could increase to nearly 10% by the end of the century.

In 1985, imports of pantyhose increased 43.5% in value and 45.6% in quantity. Imports of primarily cotton hosiery (mainly socks) showed a 66.8% gain in quantity and a 51.3% increase in value of imports in 1985 compared with 1984. Imports of cotton, unornamented hosiery from Korea went up more than six-fold, making that country the top supplier of that type, ahead of Japan. Korea increased its share of imports in other hosiery categories, too, by a wide margin.

FOREIGN TRADE

Imports:

Hosiery Imports & Exports, 1981-1985

	Thousand Dozen Pairs				
	1985	1984	1983	1982	1981
Total imports	10,482	6,221	3,708	2,294	2,193
Pantyhose	2,421	1,663	1,619	1,146	1,265
Other hosiery:					
Cotton	1,160	695	243	85	63
Wool	279	193	138	91	101
Man-made fiber	6,620	3,670	1,708	972	764

	Customs Value (thousands of dollars)*				
	1985	1984	1983	1982	1981
Total value	$66,020	$38,733	$23,019	$14,558	$13,913
Pantyhose	15,256**	10,629	9,520	6,163	6,105
Other hosiery:					
Cotton	10,871	7,184	2,877	1,090	1,163
Wool	6,086	4,223	2,871	2,298	2,533
Man-made fiber	33,807	16,697	7,751	5,007	4,139

Exports:

	Thousand Dozen Pairs				
	1985	1984	1983	1982	1981
Total exports	2,959	3,228	4,693	5,646	7,125
Pantyhose	635	686	966	1,159	1,091
Women's full- and knee-length hosiery	519	713	810	1,126	1,586
Other hosiery	1,805	1,829	2,917	3,361	4,448

	Value (thousands of dollars)				
	1985	1984	1983	1982	1981
Total value	$27,665	$29,735	$42,563	$48,441	$55,684
Pantyhose	6,670	6,578	8,477	9,884	7,224
Women's full- and knee-length hosiery	4,005	6,141	9,214	9,685	11,566
Other hosiery	16,990	17,016	24,872	28,872	38,074

* As valued for customs purposes. Does not include duties, freight or insurance.

** About 11% of this value involves 807 transactions with Costa Rica and covers hosiery previously shipped unfinished from the U.S.

Source: National Association of Hosiery Manufactures based on U.S. Bureau of the Census reports.

THE POTENTIAL MARKET

Population, 1984; Projections: 1994, 2005
(Middle series*)

	Number (thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
MALE							
Total, all ages	115,073	125,464	134,297	+16.7%	100.0	100.0	100.0
Under 5 years	9,329	9,635	8,931	- 4.3	8.1	7.7	6.6
5 to 9 years	8,296	9,866	9,094	+ 9.6	7.2	7.9	6.8
10 to 15 years	10,708	11,245	11,698	+ 9.2	9.3	9.0	8.7
16 years & over	86,742	94,718	104,574	+20.5	75.4	75.4	77.9
16 - 19	7,653	6,712	8,058	+ 5.3	6.6	5.3	6.0
20 - 34	31,522	29,725	27,416	-13.0	27.4	23.7	20.4
35 - 54	25,975	35,187	40,769	+56.9	22.6	28.0	30.4
55 - 64	10,375	9,793	14,060	+35.5	9.0	7.8	10.5
65 & over	11,217	13,300	14,271	+27.2	9.7	10.6	10.6
Median age (years)	29.9	33.0	36.0	+20.4	--	--	--
FEMALE							
Total, all ages	121,343	132,251	141,381	+16.5%	100.0	100.0	100.0
Under 5 years	8,904	9,188	8,518	- 4.3	7.3	6.9	6.0
5 to 9 years	7,924	9,415	8,678	+ 9.5	6.5	7.1	6.1
10 to 15 years	10,236	10,745	11,167	+ 9.1	8.4	8.1	7.0
16 years & over	94,279	102,903	113,018	+19.9	77.7	77.9	80.0
16 - 19	7,357	6,426	7,707	+ 4.8	6.1	4.9	5.5
20 - 34	31,205	29,068	26,706	-14.4	25.7	22.0	18.9
35 - 54	27,115	36,202	41,249	+52.1	22.3	27.4	29.2
55 - 64	11,834	11,002	15,399	+30.1	9.8	8.3	10.9
65 & over	16,768	20,205	21,957	+30.9	13.8	15.3	15.5
Median age (years)	32.4	35.6	39.2	+21.0	--	--	--

* Middle of a series of three projections, each based on alternative assumptions as to future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 952 (May 1984).

THE POTENTIAL MARKET

The market potential for women's hosiery has expanded not only due to the growth in population but also to the rapid increase in the number of women in the labor force. This group requires more apparel than nonworking women and is the most open to new fashion approaches in color and texture. As of December 1985, 51,631,000 women were in the labor force--55% of the noninstitutional female population (age 16 and older). Of these 48,288,000 were employed. This compares with an average of 31,257,000 women employed in 1972.

A much greater percentage of women are now in managerial or professional occupations which require more emphasis on dress. In 1985, this group represented 23.4% of all employed women compared with 17.0% in 1972.

Market potential for men's socks continues to be enhanced by the growing interest in variety, patterns such as argyles, in color and fashion in the entire wardrobe. The greater emphasis on activewear and participation in fitness activities has spurred the market for athletic hosiery and many new merchandising techniques have been adopted by a greater variety of retailers who are catering to this market.

Socks for infants' and children should benefit from an increase in birth totals.

Consumption

Per Capita Consumption of Hosiery Based on Supply*

Year	Total Pairs	Infants'/ Children's**	Boys', Girls', Women's Sizes 8-11***	Women's#	Men's##
1985	15.9	9.2	17.3	20.6	9.4
1984	16.0	9.8	16.4	20.4	9.7
1983	15.9	8.8	16.4	21.0	9.1
1982	14.9	9.0	14.7	19.7	8.5
1981	15.9	10.7	17.6	19.2	9.6
1980	15.2	10.2	15.1	19.3	9.1

* Shipments by U.S. mills plus imports, less exports.
** Includes boys and girls through 9 years of age.
***Includes males and females 10 to 14, and females 15 to 24 years of age.
Includes females age 15 and over.
Includes males age 15 and over.

Source: National Association of Hosiery Manufacturers

In viewing the entire hosiery market, Kurt Salmon Associates anticipated a 3% increase in unit sales in 1986, compared with a 1% gain in 1985 over 1984.

Year-to-Year Changes in Units Purchased By Consumers

	Actual		Estimated	Projected
	1983/82	1984/83	1985/84	1986/85
Hosiery, total	- 2%	- 2%	+ 1%	+ 3%
Women's pantyhose	+ 3	- 5	+ 1	+ 4
Socks, female	+ 1	+ 2	+ 4	+ 3
Socks, male	- 4	0	0	+ 1

Source: Kurt Salmon Associates: The KSA Perspective: 1986 Outlook

RETAIL SALES

As noted, retail sales of hosiery of all types is estimated at approximately $7.0 billion. No official figures are available on sales by outlet type, but a trade source has compiled the following estimate on unit sales distribution for the year 1984.

Hosiery Market Share (Units) By Outlet Type
(Including Men's, Women's, Boys' & Girls)

	Percent
Total hosiery sales	100.0%
Discount/variety stores	33.0
Food/drug stores	28.9
Department stores	15.9
Sears, Penney, Ward	10.0
Mail order	8.1
Other	4.3

Source: Chain Store Age, General Merchandise Trends, July 1985

Market shares by type of outlet vary, of course, by type of hosiery.

Women's Hosiery/Legwear/Bodywear

Total sales of all types of women's hosiery/legwear are estimated at close to $4.0 billion in 1985, including an estimated $2.4 billion in pantyhose and casual socks.

Upscale hosiery including sheer and fashion pantyhose, other fashion legwear, bodywear, etc., is primarily sold in department and specialty stores, with special brand names, designer names and private labels controlling this market. Hanes is reported to be the top-selling supplier in department and specialty stores, garnering more than a third of sales in this market segment. Their L'eggs brand (Sara Lee Corp.) is the top-seller in food/drug/discount stores.

Brands which have adopted a strong package-goods merchandising approach dominate in the supermarket/drug store/discount store market, with L'eggs still the best-selling brand overall. However, to an increasing extent, large discounters are handling upscale branded lines, or developing their own brands to trade up. Designer names such as Calvin Klein, Christian Dior, Charles Jordan, are also making strong statements in fashion hosiery.

Bodywear/exercise wear has become an important part of the big stores' hosiery departments, and this classification is expected to continue to grow. The use of higher-priced fabrics containing Lycra spandex has increased the unit price and raised dollar figures. Leotard sales now total well over 30 million units and, according to figures compiled by DuPont, retail sales for all ages exceeds $300 million, with about $230 million in the segment for females age 14 years and over.

RETAIL SALES

Women's Hosiery/Legwear/Bodywear

According to the 1982 census of retail trade compiled by the U.S. Census Bureau, the market for women's hosiery/legwear of all types represented by general merchandise and specialty stores, only, amounted to $2,360 million, of which department stores, including department store outlets operated by Sears and Penney, as well as discount department stores, accounted for 64.2%.

A trade source (Supermarket Business) has estimated that sales of women's hosiery in grocery stores amounted to $601.9 million in 1982. Adding this to the Census Bureau's reported figures for major outlets in the general merchandise store/specialty store classification gives a total of $2,962.5 million for the year 1982.

Of this sales total, department stores held a 51% share; specialty stores (including women's ready-to-wear stores, hosiery specialty stores and family clothing stores), 25%; grocery stores, 20%; variety stores, about 4%. (Drug store sales have not been included in these calculations, as figures are not available. However, total sales of women's and girls' wear of all types in drug stores amounted to only $114 million in 1982.)

Trade sources indicate that with the proliferation of fashion choices in women's hosiery, the market share held by grocery stores and drug stores has declined since 1982.

Women's Hosiery Sales in Reported Outlet Types: 1982
(In retail establishments with payroll)

	Establishments		Sales by Outlet Type	
	Number	Percent	Thous. $	Percent
Hosiery sales, reported total	48,940	100.0	$2,360,542	100.0
Department stores*	9,666	19.8	1,515,715	64.2
Women's ready-to-wear stores	18,252	37.3	432,584	18.3
Women's hosiery specialty stores	2,273	4.6	89,373	3.8
Family clothing stores	8,658	17.7	212,370	9.0
Variety stores	10,091	20.6	110,500 (e)	4.7

* Includes discount department store chains and independents and national chains.

(e) estimated

Source: Based on U.S. Bureau of Census, 1982 Census of Retail Trade.

Women's Hosiery Sales in Grocery Stores: 1982-1984
(thousands of dollars)

	1984	1983	1982
Women's hosiery, total	$726,829	$ 663,740	$601,930
Pantyhose	718,656	655,110	592,320
Stockings	8,173	156,580	9,610

Source: Supermarket Business, Annual Consumer Expenditures Study

The latest figures available which show the variations in the pattern of sales share by outlet type based on type of women's hosiery are from Stores Magazine, (June 1981) for the year 1980.

Women's Pantyhose & Knee-high Sales Share By Type of Retailer, 1980

	Non-Support	Support	Knee-Highs	Control Top	Panty Top	Total Market
Total Sales	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department/specialty stores	19.2	16.5	11.0	26.0	23.2	18.5
General mdse. chains (Sears, Penney, Ward)	9.0	9.5	8.6	14.0	9.4	11.5
Discount/variety stores	25.2	14.3	39.7	20.0	26.3	29.2
Grocery stores/supermarkets	28.4	33.8	22.4	25.8	15.7	24.2
Drug stores	9.9	15.4	12.9	10.1	8.7	10.9
Other outlets	8.3	10.5	5.4	4.1	16.7	5.7

Source: STORES (June 1981) (Based on MRCA, A.C. Nielsen)

Men's Hosiery

Total retail sales of men's hosiery of all types are estimated at $1.8 billion in 1985, up from $1.6 billion in 1984.

Information on sales by type of outlet is limited, as this classification is not separately reported in 1982 census of retail trade merchandise line sales reports. A trade source, Supermarket Business, estimated total sales in grocery stores in 1984 at $50.6 million.

On a unit basis, department stores in 1984 accounted for 16% of total units sold; K-mart, the major discount store outlet, had a 15% share; Sears, 9%; specialty stores, 5%, with the remainder held by variety, drug, discount and grocery stores, according to Apparel Merchandising (June 1985).

At most department stores, basic black, brown and navy socks are still accounting for the major share of sales. However, fashion business and designer names are getting stronger, accounting for 10% to 25% of sales in upscale department stores.

RETAIL SALES

Men's Hosiery (continued)

Women are said to purchase about 70% of men's socks, and this is the factor in the growing acceptance of multi-hued and patterned hosiery for men. Women, too, can relate to the designer names now found in men's hosiery. All three major classifications of men's hose -- dress, casual and athletic -- are becoming fashion items to an increasing degree, rather than staples.

Estimated Value of Total Consumption of Men's Hosiery
& Amount Spent in Grocery Stores: 1982-1984
(thousands of dollars)

Men's Hosiery	Total Consumption*	Amount Spent in Grocery Stores
1984	$1,331,646	$ 50,588
1983	1,218,340	45,740
1982	1,139,700	41,650

* Estimated by SB on the basis of total supply at grocery store prices.

Source: Supermarket Business: Annual Consumer Expenditures Study

RETAIL MERCHANDISING & OPERATING RESULTS

Women's Hosiery Departments

Women's Hosiery Department Merchandising & Operating Results, 1984
Compared With Total Adult Female Intimate Apparel & Accessories Division
(Selected median results)

WOMEN'S/FAMILY SPECIALTY STORES (With Total Sales Over $1 Million)	Mdse. Division: Adult Female Intimate Apparel & Acces. (26)*	Department: Women's Hosiery (18)*
Cumulative markon %	52.8	51.1
Markdowns - % of net retail sales	10.2	14.2
Gross margin (incl. cash discounts) % of net sales	44.4	45.9
Stock turns (times) at retail	2.3	2.5
Net sales % change from 1983	+ 9.6	+ 4.0
Net sales % of mdse. div. (intimate apparel, access.)	100.0	10.3
$ sales per sq. ft. of selling space (main or largest selling unit)	$193.40	$169.10

(continued)

Women's Hosiery Departments (continued)

Women's Hosiery Department Merchandising & Operating Results, 1984 Compared With Total Adult Female Intimate Apparel & Accessories Division

(Selected median results)
(continued)

DEPARTMENT STORES (With Total Sales Over $1 Million)	Mdse. Division: Adult Female Intimate Apparel & Acces. (106)*	Department: Women's Hosiery (94)*
Cumulative markon %	52.8	49.1
Markdowns - % of net retail sales	14.8	10.2
Gross margin (incl. cash discounts) % of net sales	45.9	43.9
Stock turns (times) at retail	2.5	2.6
Net sales % change from 1983	+ 8.1	+ 5.8
Net sales % of mdse. div. (intimate apparel, access.)	100.0	12.5
$ sales per sq. ft. of selling space (main or largest selling unit)	$169.10	$184.00

* Number of firms reporting.

Source: National Retail Merchants Association: Department Store & Specialty Store Merchandising & Operating Results of 1984.

Men's Hosiery Departments

Typical Operating Results in Men's Hosiery in Men's Wear Stores, 1984

(Median results)

Men's hosiery	Total Reporting Firms		Firms Handling Men's Wear Only		Firms Handling Women's Wear	
% to total furnishings sales	6.0	(87)	6.1	(36)	5.9	(51)
% to total store sales	1.1	(87)	1.3	(36)	1.0	(51)
% change in sales 1982/1981	+ 6.7	(66)	+ 6.3	(28)	+ 7.6	(38)
Markdowns-% of sales	3.1	(63)	2.4	(27)	4.7	(36)
Inventory turnover	2.1	(44)	2.2	(19)	2.1	(25)

Note: Figures in parentheses are the numbers of firms reporting data.

Source: Menswear Retailers of America, Business Newsletter Section II, 1984 Annual Business Survey, Men's Store Operating Experiences

Men's Hosiery Departments (continued)

Men's Hosiery Department Merchandising & Operating Results, 1984 Compared With Total Men's Wear Departments In Department Stores With Annual Sales Over $1 Million

(Selected median results)

	Total Adult Male Apparel (104)*	Men's Hosiery (15)*
Cumulative markon %	51.0	50.7
Markdowns - % of net retail sales	19.6	8.6
Gross margin (incl. cash discounts)	41.9	46.9
Stock turns (times) at retail	2.7	3.3
Net sales % change from 1983	+ 9.0	+ 9.2
Net sales % of adult male apparel	100.0	3.2
$ sales per sq. ft. of selling space (main or largest selling unit)	$167.20	nr

* Number of firms reporting. (It should be noted that only 15 department store companies broke out the data on men's hosiery. This compares with 90 reporting on women's hosiery).

nr not reported.

Source: National Retail Merchants Association: Department Store & Specialty Store Merchandising & Operating Results of 1984

RETAIL ADVERTISING

The pattern in newspaper advertising run by retailers in 1984, as tracked by the Advertising Checking Bureau, shows a peak in September/October and in February in 1984.

Women's Hosiery Ad Linage in Newspapers 1984

(Percent of annual total by months)

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
100.0%	9.3	11.2	8.4	8.2	9.5	2.8	6.4	5.9	11.6	10.6	8.5	7.5

Source: Newspaper Advertising Bureau, Inc.: 1986 Newspaper Advertising Planbook

BUYING HABITS

Women's Hosiery

In recent years, to meet the problem of rapidly proliferating brands and styles in women's pantyhose, discounters in some cases have cut back to offering two sizes in each style, rather than the usual three or more. In 1985, the trade publication Apparel Merchandising had a survey conducted by the Gallup Organization among women to determine the importance of sizing and other factors in their pantyhose purchases.

Asked which brand of panty hose they usually buy, 46% said they buy L'eggs; 16%, No-Nonsense; 12%, Hanes, 12%, a store brand; 14%, other brands. Brand loyalty increases with income, according to this study, increasing from about a 67% rate among women with incomes below $20,000 to 90% among women in the $40,000-and-over bracket. Availability of a brand in three or more sizes appears to be a strong factor in brand loyalty. Fit ranked first among important pantyhose characteristics ranked by women respondents.

Characteristics Most Important In Selecting Pantyhose
(Percent of respondents)

	Percent
Best fit	52%
Durable	21
Economical price	18
Color selection	6
Pattern selection	1
No answer	2
Total respondents	100%

Source: Apparel Merchandising (April 1985)

Women's Hosiery/Legwear/Socks
Average Purchase (in Units) Per 1,000 Households Each Month, 1984

	Pantyhose/Tights	Hosiery/Socks
Monthly average	962.5	668.6
January	915.2	568.2
February	888.7	623.3
March	1,199.4	751.4
April	1,014.3	597.4
May	988.2	621.9
June	941.6	735.8
July	577.5	541.0
August	812.2	541.6
September	1,089.3	733.4
October	862.8	641.1
November	941.3	701.6
December	1,219.9	966.1

Source: Newspaper Advertising Bureau Inc., based on MRCA Information Services

Teen Girls' Hosiery (continued)

In September 1984 Seventeen Magazine conducted a survey on apparel purchases made by teenage girls in preparation for going back to school. Results of the survey were projected to a total U.S. population of 8,543,000 teenage female students.

Hosiery Purchases For Back-To-School Wardrobes

	% of total Purchasing Hosiery	Purchases		Expenditures	
		Pairs (000)	%	Thous. $	%
Total hosiery purchases	86.6%	64,043	100.0%	$179,934	100.0%
Socks-knee length	27.3	8,560	13.4	21,116	11.7
-ankle	49.2	16,803	26.2	36,286	20.2
-crew	15.1	4,812	7.5	12,164	6.8
Panty hose-natural	42.0	10,191	15.9	24,949	13.9
-colored	33.6	6,797	10.6	17,517	9.7
-opaque	7.0	1,119	1.7	2,898	1.6
Stockings-knee length	23.5	6,676	10.4	13,551	7.5
-natural	19.1	4,136	6.5	9,347	5.2
-opaque	7.3	1,203	1.9	3,152	1.7
Leotards or tights	13.2	2,193	3.4	26,160	14.5
Body stockings	1.3	150	0.2	1,716	1.0

Source: Seventeen's Back-To-School Study, 1985

Seventeen Magazine has also released a report on spending patterns among female teenagers (age 12 through 19 years) in a 3-month period in 1985 (The 1985 TRU Report). Projecting to the total population, 14,115,000 in this age group, the study found the following had purchased hosiery, or had hosiery purchased for them by parents.

Items Purchased Specifically For Teen Girls in Past 3 Months By Girls or Parents

	Number of Girls Purchasing	Percent
Pantyhose	8,130,000	57.6%
Legwear (socks, tights, leg warmers)	8,102,000	57.4

Source: 1985 TRU; U.S. Census Bureau

BUYING HABITS

Teen Girls' Hosiery (continued)

According to Seventeen Magazine's 1985 Spring Apparel Study, teen girls spent a total of $15.5 billion for their new wardrobes in the areas of outerwear, innerwear and footwear in the Spring, 1985. Purchases of hosiery and legwear of all types amounted to a projected total of $456.5 million, about 3% of total apparel/footwear expenditures.

Hosiery/Legwear Purchases For Teenage Girls, Spring 1985
(All figures in thousands)

	Number Purchasing	Number Purchased	Total Expenditures
Hosiery			
Pantyhose-natural	7,433	26,165	$ 75,094
-colored	4,342	12,938	48,000
-opaque	576	1,492	4,759
Socks-Knee length	5,731	30,606	91,512
-ankle	4,129	13,048	39,405
-crew	2,015	6,408	17,494
-thigh-highs	213	213	635
Regular stockings			
-knee length	2,891	7,547	16,905
-natural	1,300	3,979	9,749
-opaque	413	728	1,514
Leotards or tights	2,515	3,595	21,498
Body stockings	212	271	1,577
Knit tights	88	88	536
Total girls buying hosiery (other than pantyhose)	11,975	107,078	$328,678
Total buying pantyhose	10,599	40,595	127,853

Source: Seventeen's 1985 Spring Apparel Study

Men's Hosiery

Trade sources estimate that fully 70% of men's hosiery is purchased for men by women. This has been a factor in the growing importance of designer brands and fashion elements in men's hosiery; the percentage too is a factor, in the lack of information on men's real preferences and shopping habits.

Men's Hosiery/Socks
Average Purchase Rate (In Units) Per 1,000 Households Each Month 1984

Monthly Average	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
624.2	418.8	361.1	495.2	400.3	357.7	569.8	523.0	668.2	604.4	511.0	763.3	1,812.3

Source: Newspaper Advertising Bureau Inc., based on MRCA Information Services

BUYING HABITS

Men's Hosiery (continued)

Distribution of Reported Men's Hosiery Purchases By Type, 1980 - 1983

	Based on Pairs Purchased			Expenditures
	1983	1981	1980	1983
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Type of men's hosiery:				
Dress socks	25.9	28.9	31.3	30.4
Support socks	1.2	1.3	1.5	2.2
Casual socks	23.1	23.0	22.7	21.3
Athletic socks	32.3	25.5	23.8	30.2
Work socks	13.7	17.3	17.7	12.1
Other socks	3.7	4.0	3.0	3.9

Source: NPD Special Industry Services,
Textile and Apparel Market Index

Men's Hosiery

Distribution of Reported Purchases of Hosiery For Men Age 17 & Older By Place of Purchase & By Price Classification, 1982, 1983

	1983		1982	
	Pairs	Expenditures	Pairs	Expenditures
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Outlet Type				
Department stores	13.5	18.6	13.0	18.6
Mass mdsrs. (incl. Sears, Ward, Penney, K mart)	35.4	32.4	34.7	31.4
Discount stores	25.1	21.1	25.1	22.0
Specialty stores	5.7	8.1	4.0	5.3
Variety stores	6.4	5.3	7.2	6.0
Grocery stores/supermarkets	2.0	3.1	4.8	4.1
Other	11.8	11.4	11.2	12.6
Price Paid				
Under $1.50	74.4	51.5	73.9	52.0
$1.50 to $1.99	11.6	15.2	13.3	17.7
$2.00 to $2.49	4.7	7.8	4.3	7.3
$2.50 or more	9.3	25.5	8.5	23.0

Source: NPD Special Industry Services,
Textile and Apparel Market Index

BUYING HABITS

Boys' Hosiery (continued)

Purchases of boys' hosiery reported in NPD's service tracing purchases among 6,500 nationally representative families showed the following distribution patterns in 1983 and 1982:

Distribution of Boys' Hosiery Purchases by Type, 1983

	Pairs	Expenditures
Total reported purchases	100.0%	100.0%
Dress socks	5.9	5.6
Casual socks	33.9	38.7
Athletic socks	53.6	49.7
Other socks	6.6	6.0

Distribution of Reported Purchases of Boys' Hosiery
By Place of Purchase & By Price Classification

	1983		1982	
	Pairs	Expenditures	Pairs	Expenditures
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Outlet Type				
Department stores	8.5	10.0	10.4	11.3
Mass mdsrs. (incl. Sears, Ward, Penney, K-mart)	43.3	40.5	42.0	40.1
Discount stores	25.9	24.4	28.1	26.4
Specialty stores	3.8	5.9	3.8	5.6
Variety stores	7.7	6.8	6.0	5.5
Grocery stores/supermarkets	3.1	3.0	2.8	2.8
Other	7.8	9.4	6.9	8.2
Price Paid				
Under $1.00	70.4	52.4	68.1	50.0
$1.00 to $1.49	19.3	23.9	22.7	28.2
$1.50 or more	10.3	23.7	9.2	21.8

Source: NPD Special Industry Services,
Textile and Apparel Market Index

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now--1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumber buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S.mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change. For orders and further information, please write to:

FAIRCHILD FACT FILES,
Fairchild Books,
7 East 12th Street, New York, N.Y. 10003

C3400-1.88-U

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

The Sports/Fitness/ Leisure Markets

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

Table of Contents

Page

MARKET TRENDS... 1

AT THE MANUFACTURER LEVEL:

GENERAL INDUSTRY STATISTICS...................................... 1
EMPLOYMENT & EARNINGS... 4
INDUSTRY CONCENTRATION.. 5
LEADING MANUFACTURERS... 7
OPERATING RESULTS..10
PLANT CAPACITY UTILIZATION.....................................11
REGIONAL INFORMATION..11
PRODUCTION/SHIPMENTS..12
FOREIGN TRADE...21

AT THE RETAIL LEVEL:

CONSUMER MARKETS..26
RETAIL SALES BY STORE TYPE..31
RETAIL SALES BY PRODUCT...38
CONSUMER PRICES...44
CONSUMER BUYING HABITS..45

SCHEDULE OF ADDITIONAL FACT FILES.................................50

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright ©1986 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved

Standard Book Number: 87005-552-6

Printed in the United States of America

THE SPORTS/FITNESS/LEISURE MARKETS

Market Trends

The only clearly defined industry segment within the broad classification of products represented in the sports/fitness/leisure market is the sporting goods/athletic goods industry. Following a good year in 1984, when shipments rose 11.2% in terms of current dollars, the value of shipments of sporting/athletic goods in 1985 went up only 1.2%. A real gain, discounting inflation, of only 1% is anticipated in 1986, according to the U.S. Department of Commerce.

Factors contributing to the slowdown included the saturation of markets for certain products, the growing market share held by imports, and an overall slowdown in consumer spending.

Imports of sporting/athletic goods increased almost 10% in 1985, reaching a 27% share of the U.S. market, while exports declined 6% in 1985. It is hoped that the weaker dollar will help export sales pick up in 1986, although the decline in the value of the dollar seems to have been halted.

A stonger economy, and the feeling of well-being that has been sparked by the sharp rise in the quality markets should help sales in the sports/fitness/leisure area. Women are participating in active sports and in aerobics and other fitness activities to an increasing extent and are a strong factor in the outlook for a pickup in business this year.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

In its broadest sense, the sports/fitness/leisure market covers a very wide range of products -- from tennis balls to aircraft. This FACT FILE, however, is limited to the product classifications of the type sold through retail oulets such as sporting goods stores and general merchandise stores. Boats, airplanes, etc., sold through specialized dealers, are not included, nor are products classified as "toys".

Industry statistics compiled by the U.S. Department of Commerce delineate trends in two major components of the Sports/Fitness/Leisure complex: the sporting/athletic goods (equipment), and the motorcycle/bicycle industries. Other major classifications -- including athletic uniforms, authentic activewear, athletic footwear, as well as sports accessories items -- are components of other unrelated broad industry classifications. Information on these are however, covered in product information (shipments, sales, etc.) in this Fact File where available.

A measure of trends and the outlook for the U.S. sporting goods industry and motorcycle/bicycle industry is included in the annual report, U.S. Industrial Outlook, compiled by the International Trade Administration, U.S. Department of Commerce.

GENERAL INDUSTRY STATISTICS

Recent Performance & Forecast: Sporting/Athletic Goods & Motorcycle/Bicycle Industries

	Millions of Dollars				% Change			
	1983	1984(e)	1985(e)	1986	1983/ 1982	1984/ 1983	1985/ 1984	1986/ 1985
Sporting goods/athletic goods*								
Value of industry shipments								
Current $	$3,334	$3,708	$3,770	nr	-1.3	+11.2	+1.7	—
Constant 1982 $	$3,296	$3,690	$3,778	$3,815	-2.4	+12.0	+2.4	+1.0
Motorcycles/bicycles, parts**								
Value of industry shipments								
Current $	$1,436	$1,553	$1,433	nr	+7.1	+ 8.1	-7.7	—
Constant $	$1,420	$1,531	$1,422	$1,448	+5.9	+ 7.8	-7.1	+1.8

* SIC 3949. See page 3 for a definition.
** SIC 3751. See page 3 for a definition.
(e) estimated
(f) forecast
nr not reported

Source: U.S. Department of Commerce,
International Trade Administration:
1986 U.S. Industrial Outlook

As noted above, the projected value of shipments of the sporting goods industry looks for a real increase (constant dollars) of 1% in 1986 compared with 1985, compared with a 2.4% gain in 1985, and 12% in 1984. The long-term outlook is for a compound annual increase of 2% in real domestic shipments between 1986 and 1990. Domestic shipments in the bicycle industry are expected to increase 2-2.5% over the next five years, according to the ITA. A 1.8% increase (in constant dollars) was the forecast for 1986, following a 7.1% decline in the real value of industry shipments in 1985.

A complete census of all manufacturers with payroll in the U.S. is compiled every five years by the U.S. Bureau of the Census. Results from the latest census, covering the year 1982, are summarized below. During intercensal years, the Bureau conducts annual surveys covering a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity.

From 1977 to 1982, the number of companies in the U.S. sporting/athletic goods industry declined from 1,757 to 1,452; while the number of plants dropped from 1,879 to 1,553 and then to 1,494 in the 1983 count. Production worker employment declined about 27% from 1977 to 1983, from 57,200 to 44,900.

Aided by inflation, the value of industry shipments in 1982 ($3,376.8 million) was 39.2% above the 1977 total ($2,425.1 million). In 1983, however, the value declined 1.3% from the 1982 total.

GENERAL INDUSTRY STATISTICS

U.S. manufacturing firms in the motorcycle/bicycle industry also declined between 1977 and 1982, dropping from 343 to 269. The number of plants fell from 350 in 1977 to 273 in 1982, then to 263 in the latest count covering 1983. Employment was down 22% in 1983 compared with 1977; however, industry shipments, in terms of current dollars, unadjusted for inflation, were up 42.5% in 1983 compared with the 1977 total.

Sporting/Athletic Goods, n.e.c. (SIC 3949*)

	1983	1982	1977
Number of companies	na	1,452	1,757
Number of establishments, total**	1,494	1,553	1,879
With 20 employees or more	442	460	496
Employees, total (thous.)	44.8	47.8	57.2
Production workers (thous.)	33.7	36.0	46.1
Payroll (mil. $)	$ 663.1	$ 677.7	$ 525.9
Value added by manufacture (mil. $)#	$1,759.3	$1,778.8	$1,273.6
Value of industry shipments (mil. $)##	$3,333.9	$3,376.8	$2,425.1
Capital expenditures, new (mil. $)	na	76.5	62.7

Motorcycles, Bicycles & Parts (SIC 3751*)

	1983	1982	1977
Number of companies	na	269	343
Number of establishments, total**	263	273	350
With 20 employees or more	68	67	63
Employees, total (thous.)	12.2	13.0	15.6
Production workers (thous.)	9.9	10.4	15.3
Payroll (mil. $)	$ 238.9	$ 224.9	$ 168.9
Value added by manufacture (mil. $)#	$ 545.7	$ 402.5	$ 369.8
Value of industry shipments (mil. $)##	$1,436.1	$1,341.1	$1,007.6
Capital expenditures, new (mil. $)	$ 26.5	23.1	24.1

n.e.c. not elsewhere classified
nr not reported

* Manufacturers are classified by industry under the Standard Industrial Classification system (SIC), determined by the principal products made as shown below:

** Each business location is counted as a separate establishment.

SIC 3949 This industry comprises establishments primarily engaged in the manufacture of sporting and athletic goods such as fishing tackle; golf and tennis goods; baseball, football, basketball and boxing equipment; billiard and pool tables; roller skates and ice skates; gymnasium and playground equipment; bowling alleys and equipment.

SIC 3751 This industry comprises establishments primarily engaged in the manufacture of motorcycles, bicycles and similar equipment and parts. Establishments primarily engaged in the assembly of motorcycles or bicycles from purchased parts are also included in this industry.

(footnotes continued)

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of the same manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

## Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts on contract work and resales). The total value of product shipments by seondary producers, is covered in the SHIPMENTS section of this Fact File.

Source: U.S. Bureau of the Census:
1982 Census of Manufactures,
Annual Survey of Manufactures, 1983

Employment & Earnings

Current information on a monthly basis covering employment, hours and earnings in the U.S. sporting/athletic goods industry is compiled by the Bureau of Labor Statistics, Department of Labor. The annual averages show the steady decline in activity in domestic plants from 1977. In that year, the BLS reported that total employment in the industry averaged 63,300. The average declined each year until 1983, when it reached a low of 50,800. There was a substantial pickup in business in 1984, and sporting/athletic goods industry employment increased over 9% reaching a monthly average of 55,500. In 1985 it averaged 1.4% below 1984, reading 54,700; but early 1986 figures indicate a pickup in employment compared with 1985 levels.

Employment & Earnings in the Sporting & Athletic Goods Industry (SIC 3949)

	February Average			Annual Average		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/84
Sporting & athletic goods:						
All employees (thous.)	56.0	55.7	+ 0.5%	54.7	55.5	- 1.4%
Production workers (thous.)	43.6	42.2	+ 3.3	41.7	42.5	- 1.9
Average weekly earnings	$273.88	$260.35	+ 5.2	$271.96	$273.50	- 0.6
Average weekly hours	40.1	38.4	+ 4.4	39.3	40.7	- 3.4
Average overtime hours	2.4	1.5	+60.0	1.9	2.9	-34.5

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings

Employment data issued by the Bureau of Labor Statistics and by the Census Bureau are not directly comparable due to differences in methodology used by each agency in compiling data.

GENERAL INDUSTRY STATISTICS

Industry Concentration

According to the 1982 Census of Manufactures, there were 1,452 companies classified in the domestic sporting/athletic goods industry, operating 1,553 plants. This number was down from 1,878 plants operated by 1,757 companies in 1977. Although several of the leading producers are divisions of large diversified multinationals, in 1982 and in 1983, 70.4% of the plants in this industry had fewer than 20 employees. These small plants tend to emphasize craftsmanship and specialties, and easily enter and exit the industry.

The large multinationals generally produce goods that require substantial capital investment and technological sophistication. These firms benefit from brand name recognition and economies of scale in marketing, research, and development. The major manufacturers often engage in importing, exporting, overseas production, contract work, and licensing the use of their trade names. Some of the major companies are Wilson Sporting Goods, a division of Pepsico, Inc.; AMF, Inc.; Brunswick Corp., and Questor Corp. (Spalding Sports). Other large, diversified companies have interests in the sporting goods industry, including Alleghany International, American Brands, Campbell Soup and others.

Of the 1,452 companies classified in SIC 3949 (sporting/athletic goods industry), 162 (11.1%) were multiunit companies, according to the 1982 census. These multiunits, however, had 62.3% of industry employment and accounted for 70% of the value added by manufacture within the industry, 70% of the total value of industry shipments. (1982 Census of Manufactures, MC82-S-5: Subject Series: Type of Organization.)

The labor cost advantages of foreign producers of bicycles, particularly those in the Far East, have been a major factor in a decline in the number of U.S. companies in this industry. (U.S. producers have responded by importing bicycles themselves.) The motorcycle industry is, of course, highly concentrated. One American firm, Harley-Davidson, and two Japanese firms, Honda and Kawasaki, are the major producers of motorcycles in the U.S. (About two-thirds of the market are held by imports, with Honda accounting for about 58%).

The 1982 census of manufactures counted 269 companies in SIC 3751 (motorcycle/bicycle/parts industry), operating 273 plants. Comparable figures in 1977 were 343 and 350, respectively. The Type of Organization report (cited above) reported that 25 companies were multiunits (9.3% of the total). The multiunits accounted for 74% of industry employment, 77% of value added by manufacture within the industry, and 82% of industry shipments.

The Census Bureau has just released a report on Concentration Ratios in Manufacturing, based on the 1982 census, which includes the following information.

GENERAL INDUSTRY STATISTICS

Industry Concentration

Share of Value of Industry Shipments Accounted For By the Largest Companies

Industry	No. of Companies	Total (mil.$)	Value of Industry Shipments* Percent accounted for by largest companies: 4 largest	8 largest	20 largest	50 largest
Sporting/athletic goods:						
1982	1,452	$3,376.8	17%	28%	44%	62%
1977	1,757	2,425.1	21	28	41	59
1972	1,441	1,729.2	28	37	50	66
Motorcycle/bicycle/parts:						
1982	269	1,341.2	59	79	88	94
1977	343	1,007.6	66	81	89	94
1972	219	659.5	65	78	92	97

Source: U.S. Bureau of the Census,
1982 Census of Manufactures:
Concentration Ratios in Manufacturing (MC82-S-7)

* For an explanation of this term, see page 4.

In terms of individual plants, in the sporting/athletic goods industry in 1982, according to the census, 113 plants with 100 or more employees (7.3% of the total) accounted for 64% of value added by manufacture within the industry and for 62.8% of industry shipments.

In the motorcycle/bicycle/parts industry, nine plants with 250 or more employees (3.3% of the plants classified in this industry) accounted for 54.3% of value added by manufacture and over 59% of industry shipments.

Concentration by Employment Size, 1982

	Establishments Number	Establishments Percent	Value added by Manufacture Mil. $	Value added by Manufacture Percent	Industry Shipments Mil. $	Industry Shipments Percent
Sporting/athletic goods: industry --	1,553	100.0%	$1,778.0	100.0%	$3,376.8	100.0%
By establishment (plant) size:						
Under 20 employees	1,093	70.4	184.1	10.4	354.6	10.5
20 - 49 employees	246	15.8	235.1	13.2	465.9	13.8
50 - 99 employees	101	6.5	222.5	12.5	437.4	13.0
100 - 249 employees	75	4.8	453.5	25.5	918.1	27.2
250 - 499 employees	32	2.1	458.2	25.8	788.8	23.4
500 or more employees	6	0.4	224.6	12.6	412.0	12.2
Motorcycle/bicycle/parts industry --	273	100.0%	402.5	100.0%	1,341.1	100.0%
By establishment (plant) size:						
Under 20 employees	206	75.5	35.1	8.8	73.5	5.5
20 - 49 employees	37	13.6	24.6	6.1	60.4	4.5
50 - 99 employees	12	4.4	27.8	6.9	60.1	4.5
100 - 249 employees	9	3.3	96.6	24.0	354.8	26.5
250 or more employees	9	3.3	218.4	54.3	792.3	59.1

Source: U.S. Bureau of the Census,
1982 Census of Manufactures, MC82-I-37C; MC82-I-39B

GENERAL INDUSTRY STATISTICS

Leading Manufacturers

The Fairchild Publications trade publication, SportStyle, compiles an annual list of the top companies in the business (The SportStyle 50). The listing for 1985 started with a volume of $43 million, while the lowest figure in the 1981 compilation was $24 million, reflecting the ability of large companies in the sporting goods and apparel industry to successfully compete in an increasingly difficult market.

The Top 50 Manufacturing Companies based on U.S. Sales, 1984

Rank	Company	$ Mil.
1	Nike	$765
2	AMF (sports products and bowling)	388.7
3	Russell Corp.	353
4	General Mills (Izod, Foot Joy)	313
5	Coleman	307
6	Adidas	290
7	Tultex	286
8	Ocean Pacific	279
9	Fuqua Industries (sporting goods)	247.6
10	Converse	244
11	Bassett Walker	240
12	Spalding (incl. license revenues)	223.4
13	Jantzen (incl. Jansport)	220
14	Wilson	218
15	Diversified Products	200
16	Puma	172
17	Pannill	170
18	Stride Rite Corp.	161.5
19	Pony	140
20	Woolrich	132
21	Figgie International	125
22	Colgate-Palmolive	124
23	Acushnet	123
24	Catalina	122
25	Champion	112
26	Bata	110
27	Adams-Milis	100
28	Warnaco Northwest Div. (Speedo, White Stag)	90
29	Hang Ten (incl. International)	90
30	Weider Health & Fitness (total sales)	88
31	Kangaroos	77
32	Pacific Trails	76
33	Danskin	75
34	New Balance	72
35	Timberland	72
36	Merona	68.4
37	Salomon	68
38	MacGregor	68
39	Reebok	65
40	Jockey (active sales only)	60

(continued)

GENERAL INDUSTRY STATISTICS

Leading Manufacturers

The Top 50 Manufacturing Companies based on U.S. Sales, 1984
(continued)

Rank	Company	$ Mil.
41	Vitamaster	60
42	Kellwood Corp. (Kelty, Wenzel)	60
43	Kayser Roth (Burlington, Interwoven)	58
44	Hyde	51
45	Kransco	50
46	Capezio	50
47	Rockport	46
48	Prince	46
49	The North Face	45
50	Penn Athletic	42.5

Source: SportStyle, June 17, 1985

The top five manufacturers listed below have been taken from a more detailed list compiled by SportStyle, covering 1983 and 1984 sales. Sources are market estimates or statements from corporate officers. (Dollar figures are in millions).

RUGGED FOOTWEAR	1984	1983
Timberland	$ 72	$ 60
Rockport	46	30
Herman's	36.5	35
Wolverine	35	33
Dunham	26	23.5

ATHLETIC FOOTWEAR	1984	1983
Nike	$620	$636
Converse	234	205
Adidas	185	210
Puma	125	125
Pony	125	114

HOME EXERCISE EQUIPMENT	1984	1983
Diversified Products	$200	$120
Ajay	80	56
VitaMaster	60	40
Weider	50	37.2
Precor	29	16.5

ATHLETIC SOCKS	1984	1983
Adams Millis	$100	$ 45
Burlington	37	37
Russell National	36.4	34
Wigwam	24	22
Interwoven	21	21

ATHLETIC FOOTWEAR/APPAREL	1984	1983
Nike	$145	$108
Adidas	105	140
Puma	47	43
Pony	15	na
New Balance	10	10

CYCLING/TRIATHLON APPAREL	1984	1983
Descente	$1.7	$0.25
Bellwether	1.5	0.8
Vigorelli	0.75	0.36
Le Coq Sportiff	0.6	0.85
Alitta	0.6	0.1

(continued)

GENERAL INDUSTRY STATISTICS

BODYWEAR

	1984	1983
Danskin	$ 75	$110
Capezio	50	50
Flexatard	20	19
Carushka	12	10
Tickets	9	6

ALPINE SKIS

	1984	1983
Rossignol	$26.8	$26
K2	18.1	13.9
Olin	17	15
Dynastar	15.6	14.5
Elan	11.7	8.7

ALPINE BINDINGS

	1984	1983
Salomon	$30.5	$25
Tyrolia	23.6	17.3
Look	10.5	8.2
Market Geze	4.5	4.5
Geze	4.3	3.8

TEAM APPAREL

	1984	1983
Russell Athletics	$118	$105
Champion	112	103
Bike	61	58.2
Delong	26	22.5
MacGregor SandKnit	23	17

TENNIS AND GOLF APPAREL

	1984	1983
Jantzen	$40	$33.6
Jockey	37	30
Catalina	36.5	37
Munsingwear	22.5	30
Tail/TFM	16.8	13.7

GOLF EQUIPMENT

	1984	1983
Acushnet	$123	$113
Spalding	80	72
Wilson	78	92.6
AMF/Ben Hogan	50	40
Ram	40	40

WARMUPS

	1984	1983
Tultex	$286	$288
Bassett Walker	240	222
Pannill	170	160
Russell Knit Apparel	168	150
Stone Manufacturing	35	31

SKI APPAREL

	1984	1983
CB Sports	$23	$21.5
Roffee	21.5	20
Sport Obermeyer	21	21
White Stag	17.1	15.5
Head Sportswear	14	13

ALPINE BOOTS

	1984	1983
Nordica	$30	$28
Salomon	28.8	19.1
Raichle	17	11.2
Lange	16.1	19
Technica	6.2	5

CROSS COUNTRY SKIS

	1984	1983
Trak	$10.9	$10.1
Salomon	5.1	4.6
Fischer	3.5	2.75
Karhu	3.5	2.3
Jarvinen	3.4	na

TEAM EQUIPMENT

	1984	1983
Wilson	$65.9	$61.7
Rawlings	61	58.5
MacGregor	45	32
Worth	30	26.5
Spalding	21	21

TENNIS EQUIPMENT

	1984	1983
Wilson	$57	$70
Penn Athletic	42.5	39
Prince	38	37
AMF/Head	20	20
Pro Kennex	11	10

ACTIVE SPORTSWEAR

	1984	1983
Izod-Lacoste	$300	$360
Jantzen	90	75.2
Merona	68.4	55
Catalina	55	46
Duffel	12.4	11.4

RUNNINGWEAR

	1984	1983
Dolfin	$11.5	$12.5
Bill Rodgers & Co.	9.1	8.5
Moss Brown & Co.	8.5	7.5
Sub-4	7.6	8.7
Hind	5.0	na

GENERAL INDUSTRY STATISTICS

BEACHWEAR

	1984	1983
Ocean Pacific	$279	$242
Hang Ten	90	90
Hobie Sportswear	35	30
Gotcha	20	15
Laguna	20	20

JUNIOR SPORTSWEAR

	1984	1983
Sassafrass	$27	$27
OP Juniors	19.7	14.2
Catalina Juniors	12	11
Sunset Beach	10	9
Daffy	7	6

RUGGED OUTERWEAR

	1984	1983
Woolrich	$132	$120
Pacific Trail	71	71
Jansport	20	20
Patagonia	16	15
AFRC	14.6	14.5

WATERSPORTS EQUIPMENT

	1984	1983
Hobie Cat/O'brien	$50	$40
Kransco	50	50
O'Neill	24	20
Connelly	10.5	8
Mistral	9.9	5

COMPETITIVE SPORTSWEAR

	1984	1983
Speedo	$38.5	$34.0
Arena	13	11.5
The Finals	6.4	6.4
Hind	3	2
Gulbenkian	3	na

OUTDOOR EQUIPMENT

	1984	1983
The Coleman Co.	$156	$144
Kellwood Corp.	60	60
Johnson Camping	25	25
Henderson Camping Prod.	24	24
The North Face	20	19.5

na not available

Source: SportStyle, June 17, 1985

Operating Results

Between 1978 and 1982, when shipments of athletic and sporting goods declined at an annual rate of 0.3%, several firms stopped producing sporting goods. Others, in response to high interest rates and the 1980-1982 recession, shut down unprofitable factories and consolidated manufacturing facilities. Results of this cost-cutting were noticeable in 1983. A Value Line Investment Survey covering a broad-based "recreation industry" showed a 19% gain in earnings on increased sales of only 1%.

The annual Sporting Goods Manufacturers Association Industry Financial Performance Study, covering sporting goods companies including manufacturers of apparel and footwear, also showed an upturn in profitability and in sales in 1983. Both turned down in 1984, however. A preliminary report by the SGMA indicates a continued decline in sales growth rate and profitability in 1985, while 1986 is seen as flat as ever.

The 1985 preliminary report covered 63 private and public companies in the industry. The median gain in sales reported for 1985 was 6.3%, and return-on-sales (after tax) was 2.9%. In the 1984 SGMA survey, sales growth was 13% and return-on-sales (after tax) declined to 4.1%.

As of May 1986, the SGMA looked for a typical 6.5% sales growth rate among the companies included in their surveys, with profitability at about 3.7%. However, the industry is expected to do better in 1987, as 'Olympic hype' begins.

GENERAL INDUSTRY STATISTICS

Plant Capacity Utilization

For the fourth quarter of 1984, plants in the sporting/athletic goods industry in the U.S. operated at 70% of the industry's preferred rate, compared with an operating rate of 86% of the preferred level in the fourth quarter of 1983. (The preferred level is defined as a level, normally between actual operations and practical capacity, which the manufacturer would prefer not to exceed due to costs or other considerations.) The following figures represent the ratio of actual utilization to the preferred level of operations.

Capacity Utilization Rates: Fourth Quarters 1981-1984

	1984	1983	1982	1981
Sporting/athletic goods industry	70	86	76	91
Motorcycle/bicycle/parts industry	nr	76	63	61

nr not reported

Source: U.S. Bureau of the Census, Current Industrial Reports: Survey of Plant Capacity, 1984 (MQ-C1(84)1

REGIONAL INFORMATION

The sporting/athletic goods industry is not highly concentrated on a regional basis. However, the State of California accounted for 15.4% of value added by manufacture and 16.2% of industry shipments, according to the 1982 census of manufactures, making this the leading state. The U.S. motorcycle/bicycle/parts industry is highly concentrated among few manufacturers, and information on a state level is withheld by the Census Bureau to avoid disclosure of individual operations. Ohio and Tennessee both have large plants in this industry.

Leading States Shipping Sporting/Athletic Goods, 1982

	Establishments (Plants)		Value added by Manufacture		Value of Shipments	
	Total	With 20+ Employees	Mil. $	Percent	Mil. $	Percent
U.S. Total	1,553	460	$1,778.0	100.0%	$3,376.8	100.0%
California	284	85	274.5	15.4	548.7	16.2
Illinois	70	27	97.3	5.5	194.5	5.8
New York	69	24	89.2	5.0	174.4	5.2
Michigan	66	20	68.8	3.9	147.3	4.4
Pennsylvania	56	15	71.1	4.0	145.6	4.3
Wisconsin	70	22	52.8	3.0	110.0	3.3
Florida	88	26	45.7	2.6	98.7	2.9
Washington	65	22	57.0	3.2	97.9	2.9
Minnesota	49	13	30.5	1.7	54.4	1.6

Note: Texas has 88 plants in this industry (26 with 20 or more employees); however, value of shipment and value added by manufacture were not reported.

Source: U.S. Bureau of the Census, 1982 Census of Manufactures (MC82-I-37C)

PRODUCT SHIPMENTS

In contrast with "industry shipments", which have been covered in data on GENERAL INDUSTRY STATISTICS, and defined on page 4, product shipments cover specific products made by both primary producers (classified within the industry) and secondary producers (classified in other, unrelated industries).

Trends in the value of product shipments have been compiled by the International Trade Administration, U.S. Department of Commerce. In terms of a constant (1982 dollar), which eliminates the effects of inflation, the ITA reported that the value of shipments of athletic and sporting goods of all kinds registered a sharp gain of 11.9% in 1984 compared with 1983, following a decline of 2.2% in 1983 compared with 1982. Sales have slowed down, however. In 1985, according to this source, the "real" gain in value of shipments was 2.4%; for 1986, the ITA forecasts a gain of only 1.0%.

On a constant dollar basis, the value of shipments of bicycles and parts by all producers gained 7.7% in 1984 compared with 1983, but registered a decline of 0.5% the following year. For the year 1986, the ITA anticipated a slight (1.1%) pickup in value of shipments.

Recent Performance & Forecast: Shipments of Sporting/Athletic Goods, Bicycles, Motorcycles, Parts

	Millions of Dollars				% Change			
	1983	1984	1985(e)	1986(f)	1983/ 1982	1984/ 1983	1985/ 1984	1986/ 1985
Sporting and athletic goods								
Value of shipments:								
Current dollars	$3,127	$3,477	$3,535	nr	-1.1%	+11.2%	+1.7	—
Constant 1982 $	3,091	3,460	3,542	$3,577	-2.2	+11.9	+2.4	+1.0
Bicycles & parts								
Value of shipments:								
Current dollars	596	642	629	—	-1.0	- 4.0	-2.0	—
Constant 1982 $	601	647	644	651	+0.2	+ 7.7	-0.5	+1.1

nr not reported

Source: U.S. Department of Commerce,
International Trade Administration
1986 U.S. Industrial Outlook

The 1983 figures on value of product shipments, included in the above table, are from the 1983 Survey of Manufacturers, conducted by the Census Bureau. This report provides further detail, as shown below, on products shipped in 1983, compared with the value reported in the 1982 census of manufactures.

PRODUCT SHIPMENTS

Value of Shipments of Specified Sporting/Athletic Goods, 1982, 1983

(Millions of dollars)

	1983	1982	% Change 1983/1982
Sporting and athletic goods	$3,126.7	$3,160.8	- 1.1%
Fishing tackle and equipment	331.6	341.9	- 3.0
Golf equipment	655.5	644.0	+ 1.8
Playground, gym, exercise equipment	678.2	531.4	+27.6
Other sporting goods, n.e.c.	1,158.7	1,314.1	-11.8
Sporting and athletic goods, n.e.c., n.s.k.	302.6	329.4	- 8.1

n.e.c. not elsewhere classified
n.s.k. not specified by kind

Source: U.S. Bureau of the Census,
1983 Annual Survey of Manufactures:
Value of Product Shipments M83(AS)-2

The census of manufactures covering all U.S. manufacturers with payroll provides the greatest detail available on shipments of specific products. The most recent census (which is undertaken by the U.S. Census Bureau every five years) covers operations in the year 1982. Findings in this census are compared with results in 1977 in the following tables.

Quantity of Shipments of Specified Sporting & Athletic Goods By All Producers, 1977, 1982

(Thousands of units, unless specified)

	1982	1977	% Change 1982/1977
Fishing rods	6,946.7	8,052.0	- 13.7%
Fishing reels	4,346.4	11,055.0	- 60.7
Fishing rod & reel combinations	5,429.3	na	na
Golf balls (1,000 doz.)	24,062.9	16,797.0	+ 43.3
Golf clubs:			
Irons	8,043.9	10,125.0	- 20.6
Woods	3,716.7	4,032.0	- 7.8
Golf bags	1,076.9	1,432.0	- 24.8
Baseball mitts & gloves	64.5	52.0	+ 24.0
Baseball bats	378.4	553.0	- 31.6
Exercise cycles	1,353.4	na	na

(continued)

Quantity of Shipments of Specified Sporting & Athletic Goods By All Producers, 1977, 1982

(Thousands of units, unless specified)
(continued)

	1982	1977	% Change 1982/1977
Footballs (1,000 doz.)	362.8	400.0	- 9.3%
Soccer balls (1,000 doz.)	49.8	na	--
Bowling balls (1,000 doz.)	1,853.5	2,599.0	- 28.7
Inflatable athletic balls (other than footballs, soccerballs, etc.)(1,000 doz.)	561.6	na	--
Tennis rackets (strung & unstrung)	2,951.6	3,409.0	- 3.2
Ice skates	457.8	1,484.0	- 69.2
Water skis	417.4	559.0	- 25.3

na not available

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Industry Series, MC-82-1-39B

Value of Shipments of Specified Types of Sporting & Athletic Goods, By All Producers, 1977, 1982

(Millions of dollars)

	1982	1977	% Change 1982/1977	% of Total 1982
Sporting and athletic goods, total	$3,160.8	$2,216.9	+ 42.6%	100.0%
Fishing tackle & equipment	341.9	270.1	+ 26.6	10.8
Glass fishing rods	33.2	48.2	- 12.7	1.3
Graphite metal fishing rods	8.9			
Other fishing rods	2.2	3.8	- 42.1	0.1
Fishing reels	58.2	63.4	- 8.2	1.8
Fish hooks, including snelled	24.4	15.3	+ 59.5	0.8
Casting plugs, spinners & spoons, flies, lures & similar artificial baits	67.7	49.2	+ 37.6	2.1
Tackle boxes	33.5	25.3	+ 32.4	1.1
Fishing rod & reel combinations	59.6	64.6	+ 76.0	3.6
All other fishing equipment	54.1			

(continued)

Value of Shipments of Specified Types of Sporting & Athletic Goods, By All Producers, 1977, 1982

(Millions of dollars)
(continued)

	1982	1977	% Change 1982/1977	% of Total 1982
Golf equipment	$ 644.0	$ 385.1	+67.2%	20.3%
Golf balls	199.8	106.3	+88.0	6.3
Golf clubs:				
Irons	156.5	118.3	+32.3	5.0
Woods	125.8	63.1	+99.4	4.0
Golf bags	41.1	33.1	+24.2	1.3
All other golf equipment	120.8	64.2	+88.2	3.8
Playground, gymnasium & gymnastic equipment	531.4	257.8	+106.1	16.8
Home playground equipment, incl. swing sets, slides, seesaws, sandboxes, etc.	85.3	57.2	+49.1	2.7
Institutional playground equipment, incl. swing sets, slides, seesaws, etc.	58.7	35.3	+66.3	1.9
Gymnasium & gymnastic apparatus & equipment	53.3	56.7	- 6.0	1.7
Health, physical fitness & exercise equipment	123.3	98.6	+237.3	4.0
Weight lifting equipment	126.2			
Exercise cycles	83.1			
Playground, gymnasium & gymnastic equipment, n.s.k.	1.4	9.9	-85.9	0.1
Other sporting & athletic goods	1,314.1	1,060.8	+23.9	41.6
Billiard & pool tables	55.6	52.9	+ 5.1	1.8
Billiard & pool supplies	9.8	6.8	+50.8	0.3
Bowling alleys & bowling pin setters	16.3	1.5*	na	0.5
Bowling alley playing supplies:				
Bowling balls	36.7	34.6	+ 6.1	1.2
Other bowling alley supplies	81.0	66.1	+22.5	2.6
Baseballs	21.1	11.7	-12.1	0.7
Softballs		12.3		
Baseball mitts & gloves	17.6	12.2	+44.3	0.6
Baseball bats, incl. softball:				
Wood	30.3	10.5	+28.9	1.0
Metal		13.0		
Soccer balls	2.5	**	na	0.1
Footballs	24.2	21.7	+11.5	0.8
Basketballs	14.3	30.7	-53.4	0.5
Inflatable athletic balls other than basketballs & footballs	7.8	19.0	-58.9	0.2

(continued)

Value of Shipments of Specified Types of Sporting & Athletic Goods, By All Producers, 1977, 1982

(Millions of dollars)
(continued)

	1982	1977	% Change 1982/1977	% of Total 1982
Other sporting & athletic goods (continued)				
Shoe & rink roller skates	$ 57.0	$ 40.2	+41.8%	1.8%
Wooden & plastic skateboards, incl. complete sets	3.7	49.5	-92.5	0.1
Ice skates	13.6	21.4	-36.4	0.4
Snow skis	37.5	42.5	-11.8	1.2
All other winter sports equipment	23.1	35.8	-35.5	0.7
Surfboards	2.3	20.2	+71.3	0.1
Water skis	32.3	--	--	1.0
Underwater sports equipment & sail boards	83.7	36.8	+127.4	2.6
Lawn tennis equipment:				
Rackets, all types	112.7	52.6	+114.3	3.6
Tennis balls All other tennis equip. & accessories	91.9	63.1 19.4	11.4	2.9
Racquetball rackets	30.9	***	na	1.0
Archery equipment	73.2	63.7	+14.9	2.3
Football protective equipment	20.7	29.8	-30.5	0.7
Football, baseball & soccer equip., n.e.c.	47.5	15.8	+200.6	1.5
Wading & above ground pools, under 15 ft. in diameter, not filtered, including plastics & metal	71.7	13.4	+435.1	2.3
Above ground swimming pools, 15 ft. in diameter, filter & over (completely manufactured)	37.2	46.3	-19.7	1.2
Other sporting & athletic equipment	222.4	191.3	+16.3	7.0

n.s.k. not specified by kind
n.e.c. not elsewhere classified
na not available
* did not include pin setters in 1977
** included in inflatable athletic balls in 1977
*** included in other sporting & athletic equipment in 1977

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Industry Series MC82-I-39B

PRODUCTION/SHIPMENTS

Bicycles, Motorcycles, Mopeds

Quantity & Value of Shipments of Motorcycles, Bicycles & Parts, 1977, 1982
(Quantity in thousands; value in millions of dollars)

	Quantity		Value	
	1982	1977	1982	1977
Motorcycles, bicycles, parts, total	--	--	$1,143.1	$ 847.3
Bicycles, adult tricylces, unicycles; children's 2-wheel sidewalk cycles	--	--	601.6	490.4
Bicycles, complete, with 1 or both wheels 25 inches or more				
Single speed	347.9	834.1	23.5	38.3
Three speed	608.8	744.7	43.3	40.9
Five speed	*	105.7	*	8.7
Ten speed	1,189.3	2,102.8	160.8	153.2
Over ten speed	389.1		41.7	
Bicycles, complete with both wheels less than 25 inches	2,779.2	3,411.4	206.1	152.7
Other, incl. unicycles & adult tricycles	74.1	150.9	21.1	12.0
Bike parts & type not specified	--	--	105.0	84.5
Motorcycles, motorbikes, mopeds, scooters, trail vehicles & parts	--	--	480.8	286.1
Type not specified	--	--	60.8	70.7

* Combined with data on over-10-speed

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Industry Series MC82-1-37C-4

Concentration of Product Shipments

Share of Specified Sporting Goods Shipments Accounted For By The Largest U.S. Manufacturers, 1977, 1982

	Value (Mil. $)	% of Value Accounted For By Largest Companies			
		Top 4	Top 8	Top 20	Top 50
Sporting and athletic goods					
1982	$3,160.8	15%	26%	41%	59%
1977	2,216.9	18	26	39	54
Fishing tackle, equipment					
1982	341.9	37	55	71	85
1977	270.1	29	41	64	83
Golf equipment					
1982	644.0	44	62	89	98
1977	385.1	42	62	88	98
Playground, gym, exercise equipment					
1982	531.4	33	48	75	93
1977	257.8	31	47	73	93
Bicycles and parts					
1982	601.6	72	85	96	100
1977	490.4	76	92	99	100

Source: U.S. Bureau of the Census, 1982 Census of Manufactures: Concentration Ratios in Manufacturing, Subject Series MC82-S-7

PRODUCTION/SHIPMENTS

Activewear

The growing number of women participating in active sports and fitness activities, as well as the popularity of the "look" provided by activewear, regardless of end-use, has led to sharp increases in production of some items, particularly "sweats". The following table summarizes information on U.S. production of types of activewear for men and for women which are designed primarily for active sports participation -- although many purchasers may use them only for leisure/street wear.

Production & Value of shipments of Specified Active Sportswear, 1983, 1984
(Quality in 1,000 dozens; value in millions of dollars)

	Quantity			Value		
	1984	1983	1984/83	1984	1983	1984/83
Men's & boys':						
Athletic shorts, incl,. jogging shorts & tennis shorts	4,773	5,586	- 14.6%	216.8	227.7	- 4.8%
Sweat shirts	6,722	6,194	+ 8.5	348.6	345.2	+ 1.0
Sweat pants	2,496	2,156	+ 15.8	166.0	144.1	+15.2
Warm-up or jogging suits	1,490	1,332	+ 11.9	111.7	108.6	+ 2.9
Swimwear, total (fashion & competitive)	1,668	1,573	+ 6.0	110.5	103.1	+ 7.2
Woven	1,248	1,094	+ 14.1	na	na	--
Knit	185	216	- 14.4	na	na	--
Not specified	235	263	- 10.6	na	na	--
Team sports uniforms, total	987	1,195	- 17.4	70.0	81.1	- 13.7
Softball & baseball	391	476	- 17.9	32.0	36.4	- 12.1
Football	276	346	- 20.0	18.2	22.5	- 19.1
Basketball	280	315	- 11.1	16.8	18.8	- 10.6
Other	40	58	- 31.0	3.0	3.4	- 11.8
Ski jackets, including vests	82	108	- 24.1	40.4	51.4	- 21.4
Ski pants	13	16	- 18.8	8.0	8.9	- 10.1
Women's, misses' & juniors':						
Athletic shorts, including jogging shorts, tennis skirts, etc.	3,164	3,254	- 2.8	218.0	188.7	+ 15.5
Sweat pants	761	146	+421.2	44.6	12.0	+271.7
Sweat shirts	1,489	887	+ 67.9	86.1	54.0	+ 59.4
Body suits and body shirts	354	na	--	45.7	na	--
Warm-up jogging suits	851	1,908	- 55.4	84.5	143.3	- 41.0
Swimsuits, total (fashion & competitive)	3,170	2,893	+ 9.6	418.7	390.9	+ 7.1
Woven	552	589	- 6.3	na	na	--
Knit	2,175	1,896	+ 14.7	na	na	--
Not specified	443	408	+ 8.6	na	na	--
Ski jackets, including vests	46	50	- 8.0	27.4	29.6	- 7.4
Ski pants	12	14	- 14.3	7.6	7.9	- 3.8
Team sports uniforms	499	537	- 7.1	37.0	32.3	+ 14.6

na not available

Source: U.S. Bureau of the Census,
Current Industrial Reports (MA-23E & F(84)

PRODUCTION/SHIPMENTS

Athletic Footwear

Two distinct classifications of the U.S. footwear industry are involved in athletic footwear: types with rubber or plastic soles vulcanized to fabric uppers (such as tennis shoes and various types of athletic and leisure shoes) and nonrubber footwear (which includes jogging and running shoes, golf shoes, rubber-soled shoes with leather or plastic uppers, etc.)

The narrow definition of athletic footwear which applied mainly to very functional athletic footwear in past years has been broadened greatly to encompass a much larger classification -- "athleisure" footwear. These shoes have a "sporty" look and can be worn not only for active sports but for aerobics, leisure or street wear.

There has been a sharp downturn in U.S. production and shipments of rubber/plastics footwear for the past 13 years, and this trend is expected to continue. In the latest annual Census Burau report, covering 1984, production of shoes with rubber or plastic soles and fabric uppers totaled 64,510,000 pairs, which was 17% below the 1983 total. Imports now account for over 60% of the U.S. market. Domestic manufacturers are trying to adapt by concentrating on specialized footwear types in which they can be competitive, by diversifying, and by importing to fill out lines.

In general, the market for athletic footwear has been turned upside down by the growing participation of women in active sports and fitness activities. This has brought about rapid style and fashion changes, and made the market very unpredictable. The styling of "athleisure" footwear types shifted suddenly away from the athletic look toward more functional walking and aerobic types. The distribution pipeline clogged, and inventories showed a massive buildup by mid-1985. Preliminary figures for 1985, issued by the Census Bureau, showed U.S. production of nonrubber athletic footwear at only 7,268,000 pairs compared with 13,980,000 in 1984. Within the footwear industry, U.S. makers of nonrubber athletic footwear had the lowest capacity utilization rate (56%).

A bright spot for U.S. manufacturers has been an increase in exports of athletic footwear. In the first half of 1985, footwear exports to Japan, alone, were up 37%, and most of this was athletic footwear. American sport shoe crazes sparked by basketball and aerobics are helping U.S. footwear manufacturers in Europe, where it is estimated they now have a 30% market. Pony, Sport and Leisure are also reported to be restructuring their European operations. The trend is for large U.S. footwear firms to set up wholly-owned subsidiaries to produce and sell abroad.

Early in 1986, six of the largest U.S. athletic footwear and apparel companies formed a new international athletic trade association, the International Athletic Footwear & Apparel Manufacturers' Association (IAFAMA), to further their common interests.

According to the Sporting Goods Manufacturers Association (SGMA), in the fourth quarter of 1985, shipments of athletic shoes in the U.S. totaled 17.4 million and of that total Nike shipped 25.9%, followed by Reebok (which is coming up fast), 13.2%; and by Converse, 6.1%. Shipments of the leaders by type of shoe were reported as follows:

Basketball		Running		Aerobic	
Nike	46.3%	Nike	33.2%	Reebok	58.2%
Converse	17.6	New Balance	8.8	Nike	7.7
Pony	5.9	Adidas	6.6	Pony	4.4
				Avia	3.7

Athletic Footwear (continued)

Concentration of Shipments

In the nonrubber athletic footwear industry, the Census Bureau's 1982 census counted 30 companies with annual shipments of $100,000 or more. (Total product shipments were valued at $219.3 and 16.6 million pairs were shipped.) the share of shipments accounted for by the largest companies in a general category, of which 85% was nonrubber athletic footwear showed the 20 largest companies accounting for 86% of shipments; the eight largest, 53%; the four largest, 32%.

Shipments of rubber/plastic footwear, including tennis shoes, running, basketball, etc., were reported at $536.1 million in 1982. There were 36 companies in the industry with shipments valued at $100,000 or more, but the 20 largest companies accounted for 96% of shipments. The eight largest accounted for 70%; the four largest 45%.

The Census Bureau changed the system in reporting on production of non-rubber athletic footwear by type in 1984. However, as previously noted, the total declined 24% from 18,307,000 pairs in 1983 to 13,980,000 in 1984. About 41% of 1984 production were of shoes with plastic (vinyl) uppers, 54% had leather uppers, about 5% had uppers of other materials.

Production of Non-rubber Athletic Shoes for Men, Women & Children, 1984
(Thousands of pairs)

	Total	% of Total
Athletic shoes, total	13,980	100.0%
By type:		
Court shoes	1,762	12.6
Running or jogging shoes	3,884	27.8
Cleated shoes, except golf shoes	125	8.9
All other	8,290	59.3
By sex:		
Men's	3,730	26.7
Women's	2,559	18.3
Children's	7,691	55.0
By material:		
Leather uppers	7,498	53.6
Plastic (vinyl) uppers	5,723	40.9
All other materials	759	5.5

Source: U.S. Bureau of the Census, Current Industrial Reports: Footwear MA31A(84)-1

PRODUCTION/SHIPMENTS

Quantity & Value of Shipments of Non-rubber Athletic Footwear, 1983, 1984
(Quality in 1,000 pairs; value in millions of dollars)

	Quantity		% Change	Value		% Change
	1984	1983	1984/83	1984	1983	1984/83
Athletic footwear (men's women's & children's)	14,120	17,265	-18.2%	$206,188	$233,910	-11.9%

Source: U.S. Bureau of the Census, Current Industrial Reports Footwear MA31A(84)-1

PRODUCER PRICES

Producer (Factory) Price Indexes For Specified Types of Sporting Goods & Activewear, 1984, 1985 Annual Averages
(1967=100, unless otherwise noted)

	Annual Average		% Change
	1985	1984	1985/84
Athletic footwear (June 1980=100)	104.9	104.1	+ 0.8%
Designed for sports	117.1	115.3	+ 1.6
Sporting and athletic goods	204.1	205.3	- 0.6
Baseball gloves	202.8	209.4	- 3.2
Footballs	203.7	208.6	- 2.3
Bowling balls	186.2	181.4	+ 2.6
Bicycles (Dec. '84=100)	98.0	na	--

na not available

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

The growth in imports of sporting/athletic goods, and related products, has been a major factor in the slowdown in the U.S. industry. Imports of sporting goods increased nearly 10% in 1985, according to the Census Bureau, reaching an estimated $1.2 billion, and representing 27% of total domestic consumption compared with 15% in 1972. As previously noted, the impact of imports on the athletic footwear industry has been even greater.

FOREIGN TRADE

In addition to Japan, the majority of U.S. imports come from developing countries, where labor costs are much lower than in the U.S. The leading suppliers for sporting goods in 1985 were Taiwan, South Korea, and Japan. Taiwan, South Korea, and other developing countries benefit from the special provisions of the Generalized System of Preferences, Trade Act of 1974, which provides duty-free treatment for eligible items. The sharp increase in the value of the dollar -- turned around somewhat this year -- has been an aid to foreign suppliers, making their products less expensive in the U.S. U.S. tariff rates have also been reduced.

Exports of sporting goods, on the other hand, declined in 1985 by about 6%, but may be helped this year by a weaker dollar. The value of exports in 1985 was reported at about $300 million. Developed countries are the best markets for U.S. sporting/athletic goods -- including Japan, Canada, and the United Kingdom. Exports represented 8.8% of U.S. manufacturers shipments in 1985, down from 12.3% in 1982.

Adversely affecting U.S. exports are the quotas instituted by the European Economic Community on gymnastic equipment and snow skis, which were issued in retaliation for U.S. quotas on specialty steel imports. The strong U.S. dollar, which made U.S.-made products expensive for foreign buyers, has been another factor working against exports.

Trends & Outlook For Foreign Trade in Sporting/Athletic Goods & Bicycles

	Millions of Dollars				% Change			
	1983	1984	1985(e)	1986(f)	1983/ 1982	1984/ 1983	1985/ 1984	1986/ 1985
Sporting and athletic goods								
Value of imports	$ 828	$1,091	$1,190	$1,260	+19.1	+31.8	+ 9.1	+ 5.9
Import/new supply ratio*	0.209	0.239	0.252	—	+16.1	+14.1	+ 5.5	—
Value of exports	$ 366	$ 332	$ 312	$ 320	- 5.6	- 9.4	- 5.9	+ 2.6
Export/shipment ratio*	0.17	0.095	0.088	—	- 4.6	-18.5	- 7.5	—
Bicycles & parts								
Value of imports	$ 329	431	440	nr	+ 58.1	+30.8	+ 2.1	—
Import/new supply ratio*	0.330	0.402	0.411	nr	+ 28.4	+21.8	+ 2.2	—

* New supply is the sum of product shipments plus imports.
(e) estimated
(f) forecasted
nr not reported

Source: U.S. Department of Commerce,
International Trade Administration
1986 U.S. Industrial Outlook

FOREIGN TRADE

Imports

Monthly and annual compilations covering U.S. imports are provided by the U.S. Census Bureau. Summarizing the major classifications covered in these reports, the largest value of imports in the sporting goods field is in bicycles. These accounted for 25% of the total value reported for major classifications, followed by fishing equipment (15%).

Summary of Imports of Reported Sporting Goods Categories, 1984, 1985
(Millions of dollars)

	1985	1984	% Change 1985/1984
Reported sporting goods classifications, total	$1,558.8	$1,464.7	+ 6.4%
Fishing equipment	233.5	208.8	+ 11.8
Golf equipment	111.1	104.9	+ 5.9
Tennis equipment	75.5	94.0	- 19.7
Baseball equipment	120.9	115.1	+ 5.0
Athletic balls	72.1	64.7	+ 11.4
Skates (roller & ice)	37.6	37.5	+ 0.3
Ski equipment	117.9	111.3	+ 5.9
Bicycles	388.8	380.6	+ 2.1
All other categories	401.4	347.8	+ 15.4

Source: U.S. Census Bureau, U.S. General Imports, FT 135

Detailed information on imports of specific products within the above classifications were reported as shown in the following table covering 1984 and 1985.

Imports of Specified Types of Sporting & Athletic Goods, 1984, 1985

	Value (C.I.F.*) (Millions of Dollars)			Quantity (Thousands of Units)		
	1985	1984	% Change 1985/84	1985	1984	% Change 1985/84
Bagatelle, billiard & pool equip. (exc. tables) & parts	$ 10.2	$ 8.7	+ 17.2%	—	—	—
Table tennis equip. (exc. tables) & parts	3.4	2.3	+ 3.0	—	—	—
Tables designed for games	6.2	2.1	+195.2	—	—	—

(continued)

Imports (continued)

Imports of Specified Types of Sporting & Athletic Goods, 1984, 1985
(continued)

	Value (C.I.F.*) (Millions of Dollars)			Quantity (Thousands of Units)		
	1985	1984	% Change 1985/84	1985	1984	% Change 1985/84
Fishing equipment, total	233.5	208.8	+ 11.8	—	—	—
Snelled fish hooks	1.4	2.1	- 33.3	—	—	—
Fish hooks other than snelled	8.4	9.0	- 6.7	—	—	—
Artificial baits & flies	17.7	16.5	+ 7.3	100,351.5	103,070.1	- 2.6%
Fishing rods	75.0	64.2	+ 16.8	15,518.0	14,602.8	+ 6.3
Parts of fishing rods	4.1	5.5	- 25.5	—	—	—
Fishing reels	102.3	84.1	+ 21.6	15,228.7	11,782.3	+29.3
Parts of fishing reels	2.6	2.1	+ 23.8	—	—	—
Sport fishing tackle & equipment & parts, n.e.c.	22.0	25.3	- 13.0	—	—	—
Golf equip., total	111.1	104.9	+ 5.9	—	—	—
Golf balls	4.6	3.7	+ 24.3	11,567.9	8,853.7	+30.7
Golf clubs	17.3	13.2	+ 31.1	1,374.0	804.1	+70.9
Parts for golf clubs	43.9	43.5	+ 0.9	—	—	—
Golf gloves	32.3	33.9	- 4.7	11,750.5	12,466.1	- 5.7
Golf equip. & parts, n.e.c.	13.0	10.6	+ 22.6	—	—	—
Bicycles, having both wheels over 25 inches	252.0	235.0	+ 7.2	3,362.3	2,794.9	+20.3
Parts for bicycles, n.e.c.	136.8	145.6	- 6.0	—	—	—
Lawn tennis equip., total	75.5	94.0	- 19.7	—	—	—
Lawn tennis balls	1.2	2.0	- 40.0	2,137.2	4,872.7	-56.1
Lawn tennis racquets, strung or not strung	61.9	78.0	- 20.6	3,783.1	5,201.8	-27.3
Lawn tennis equip. & parts, n.e.c.	12.4	14.0	- 11.4	—	—	—
Baseball equip., total	120.9	115.1	+ 5.0	—	—	—
Baseballs & softballs	49.8	47.7	+ 4.4	30,834.7	31,752.9	- 2.9
Gloves & mitts for baseball & softball	54.7	50.5	+ 8.1	6,605.5	6,204.0	+ 6.5
Baseball equip. (exc. balls & gloves) & parts, n.e.c.	16.4	16.8	- 2.4	—	—	—
All other balls, total	72.1	64.7	+ 11.4	—	—	—
Basketballs	31.4	23.0	+ 36.5	7,698.5	5,567.8	+38.3
Footballs	5.0	3.5	+ 42.9	1,842.6	1,378.5	+33.7
Soccer & polo balls	12.3	17.2	- 28.5	3,345.8	4,244.4	-21.2
Bowling balls	—	—	—	0.9	0.6	+50.0
Balls for games & sports, n.e.c.	23.4	21.0	+ 11.4	—	—	—

(continued)

Imports (continued)

Imports of Specified Types of Sporting & Athletic Goods, 1984, 1985 (continued)

	Value (C.I.F.*) (Millions of Dollars)			Quantity (Thousands of Units)		
	1985	1984	% Change 1985/84	1985	1984	% Change 1985/84
Skates (roller & ice), total	$ 37.6	$ 37.5	+ 0.3%	—	—	—
Roller skates (incl. footwear with skates permanently attached) & parts	22.8	23.2	- 1.7	—	—	—
Ice skates permanently attached to footwear	13.1	12.5	+ 4.8	824.3	703.9	+ 17.1%
Ice skates not permanently attached to footwear	0.1	0.2	-50.0	5.7	23.5	- 75.7
Ice skate blades & other parts	1.6	1.6	—	—	—	—
Ski & allied equip., total	117.9	111.3	+ 5.9	—	—	—
Snow skis	54.5	50.1	+ 8.8	1,292.6	1,065.2	+ 21.3
Tobbogans	2.1	2.0	+ 5.0	422.9	301.7	+ 40.2
Ski equip. (water ski, bindings, poles, etc.) n.e.c.	61.3	59.2	+ 3.5	—	—	—
Hockey equip. (exc. skates) & parts	21.2	21.1	+ 0.5	—	—	—
Archery equip. & parts	4.2	3.0	+40.0	—	—	—
Playground, gymnasium, gymnastic & exercise equip., n.e.c.	188.6	135.4	+39.3	—	—	—
Badminton equip. & parts thereof	4.9	5.2	- 5.8	—	—	—
Game, sport, or athletic equip., n.e.c.	162.7	169.0	- 3.7	—	—	—

n.e.c. not elsewhere classified

* The C.I.F. value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price, including all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Note: Data on imports of activewear is not available separately from general-use apparel for the most part, and therefore not included in the above table. For athletic footwear, see the Fairchild Footwear Fact File.

Source: U.S. Bureau of the Census,
U.S. General Imports, (FT 135, December 1984, 1985).

AT THE RETAIL LEVEL

CONSUMER MARKETS

The Size of the Potential Market

Market prospects are enhanced by current demographic trends. The fastest growing segment of the population between 1985 and 2005 will be the 35 - 54 year old age group. This group is the most interested in sports participation, in fitness, and in fashionable sportswear and it is in its prime earning years, As this group grows, so are sales of sporting goods expected to grow.

Currently, the 35 - 54 year age group represents 22.7% of the U.S. population. By 2005, it is expected to grow to 29.9% of the total.

With the generally accepted income-sensitivity of the sporting goods market, the influx of women into the work force is also aiding the boost in sales. As more and more women join the labor force, the median household income has risen dramatically. With less free time, these women are buying more fitness equipment for home use.

U.S. Population 1985 & Projections - 1994*, 2005*

	Number (Thousands)			% Change	Percent Distribution		
	1985	1994	2005	2005/1985	1985	1994	2005
Male							
Total, all ages	116,649	125,464	134,297	+ 15.1	100.0%	100.0%	100.0%
Under 5 years	9,230	9,635	8,931	- 3.2	7.9	7.7	6.6
5 to 9 years	8,608	9,866	9,094	+ 5.6	7.4	7.9	6.8
10 to 15 years	10,691	11,245	11,698	+ 9.4	9.2	9.0	8.7
16 years & over	88,119	94,718	104,574	+ 18.6	75.5	75.4	77.9
16 - 19	7,548	6,712	8,058	+ 6.8	6.5	5.3	6.0
20 - 34	31,918	29,725	27,416	- 14.1	27.4	23.7	20.4
35 - 54	26,671	35,187	40,769	+ 52.9	22.9	28.0	30.4
55 - 64	10,500	9,793	14,060	+ 33.9	9.0	7.8	10.5
65 & over	11,529	13,300	14,271	+ 23.8	9.9	10.6	10.6
Median age (years)	30.3	33.0	36.0	--	--	--	--
Female							
Total, all ages	122,634	132,251	141,381	+ 15.3	100.0	100.0	100.0
Under 5 years	8,806	9,188	8,518	- 3.3	7.2	6.9	6.0
5 to 9 years	8,213	9,415	8,678	+ 5.7	6.7	7.1	6.1
10 to 15 years	10,180	10,745	11,167	+ 9.7	8.3	8.1	7.9
16 years & over	95,434	102,903	113,018	+ 18.4	77.8	77.9	80.0
16 - 19	7,270	6,426	7,707	+ 6.0	5.9	4.9	5.5
20 - 34	31,562	29,068	26,706	- 22.7	25.7	22.0	18.9
35 - 54	27,765	36,202	41,249	+ 48.6	22.6	27.4	29.2
55 - 64	11,834	11,002	15,399	+ 30.1	9.6	8.3	10.9
65 & over	17,002	20,205	21,957	+ 29.1	13.9	15.3	15.5
Median age (years)	32.7	35.6	39.2	--	--	--	

(continued)

The Size of the Potential Market

U.S. Population 1985 & Projections - 1994*, 2005*
(continued)

	Number (Thousands)			% Change	Percent Distribution		
	1985	1994	2005	2005/1985	1985	1994	2005
Total male & female							
Total, all ages	239,283	257,714	275,677	+ 15.2	100.0%	100.0%	100.0%
Under 5 years	18,037	18,823	17,449	+ 3.4	7.5	7.3	6.3
5 to 9 years	16,822	19,281	17,772	+ 5.6	7.1	7.5	6.5
10 to 15 years	20,872	21,991	22,865	+ 9.5	8.7	8.5	8.3
16 years & over	183,553	197,619	217,591	+ 18.5	76.7	76.7	78.9
16 - 19	14,818	13,138	15,765	+ 6.4	6.2	5.1	5.7
20 - 34	63,434	58,792	54,122	- 14.7	26.5	22.8	19.6
35 - 54	54,436	71,389	82,018	+ 50.7	22.7	27.7	29.7
55 - 64	22,334	20,793	29,459	+ 31.9	9.3	8.1	10.7
65 & over	28,530	33,507	36,227	+ 27.0	11.9	13.0	13.1
Median age (years)	31.2	34.3	37.6	--	--	--	--

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Armed Forces overseas are included.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census, Current Population Reports,
Series P-25, No. 952 (May 1984),
Series P-25, No. 985 (April 1986)

In addition to a favorable population/age mix, the amount of disposable income is a prime factor in determining the growth of the industry. According to a report issued by the U.S. Census Bureau and The Conference Board's Consumer Research Center, some 26.5 million households -- about one out of every three households -- have income above that required for a "comfortable" standard of living. The "discretionary income", which is the amount of money households have after paying taxes and normal household expenses, amounts to about $280 billion (measured in 1984 dollars). It represents 16% of all household income after taxes averaging about $10,530, based on the Census Bureau's May 1983 income survey.

With the continuing increase in the number of two-earner households, the amount of discretionary income will grow. These higher income households also tend to have more leisure time and will spend more on fitness, sporting goods and apparel.

Households With Spendable Discretionary Income By Age of Household Head, 1983

	Number (thousands)	Percent	Spendable Discretionary Income Aggregate (billions)	 Average	 Per Capita
Total households	83,918	100.0			
With discretionary income	26,409	31.5	$ 277.9	$10,525	$3,713
Age of householder					
Under 25 years	1,195	21.0	7.7	6,444	2,833
25 to 29 years	2,472	26.1	18.9	7,654	2,867
30 to 34 years	3,355	34.8	30.3	9,021	2,799
35 to 39 years	2,650	30.2	26.8	10,127	2,964
40 to 44 years	2,579	35.5	29.9	11,606	3,056
45 to 49 years	2,224	36.1	26.0	11,674	3,384
50 to 54 years	2,336	37.7	29.2	12,479	4,017
55 to 59 years	2,672	40.7	34.1	12,766	4,889
60 to 64 years	2,180	33.5	25.1	11,506	4,923
65 years and over	4,748	26.9	50.0	10,531	5,633

Source: U.S. Bureau of the Census & The Conference Board
A Marketer's Guide to Discretionary Income (1985)

Sports Participation & Attendance

According to the latest in a series of studies covering participation of adults 18 years old and over in selected sports, conducted by the Gallup Organization, swimming is the number one sport. In the 1982 study, 37% of adults reported they had swum in the last twelve months.

The 1985 study reveals that fishing surpassed bicycling as the number two sport, with a 32% participation rate versus 31% for bicycling. In 1982, participation rates were 24% and 27%, respectively.

Gallup reports that between 1982 and 1985, thirteen sports recorded increases in participation, eight showed declines, three remained stable and one, running/jogging, was not measured in 1982.

Participation in Selected Sports 1982, 1985
(Percent of adults participating in past 12 months)

	1985	1982
Swimming	41%	37%
Fishing	32	24
Bicycling	31	27
Bowling	23	24
Running/jogging	23	na
Camping	22	19
Softball	20	16
Volleyball	15	13
Motorboating	15	12

(continued)

Sports Participation & Attendance

Participation in Selected Sports 1982, 1985
(Percent of adults participating in past 12 months)
(continued)

	1985	1982
Basketball	14%	18%
Hunting	13	13
Golf	12	8
Ping pong/table tennis	12	13
Tennis	12	14
Baseball	12	10
Canoeing/rowing	10	7
Flying disk (frisbee)	9	17
Rollerskating	9	12
Horseback riding	8	7
Skiing	7	6
Waterskiing	7	7
Sailing	5	4
Ice skating	5	7
Archery	3	3
Handball	3	4

Source: Gallup Organization, Inc. 1986

Following is a list of the top ten sports based on participation by men and by women as determined by a survey of adults 18 years old and over by the Gallup Organization in late 1985.

Participation in Specified Sports By Sex, 1985
(Percent participating in the past twelve months)

Men		Women	
	Percent		Percent
Swimming	42%	Swimming	40%
Fishing	41	Bicycling	33
Bicycling	29	Aerobics	31
Pool/billiards	27	Fishing	24
Weight training	26	Bowling	23
Jogging	25	Camping	21
Softball	25	Jogging	21
Camping	24	Hiking	18
Bowling	23	Softball	16
Basketball	22	Volleyball	14

Source: The Gallup Organization

CONSUMER MARKETS

Sports Participation & Attendance

Women are expected to be the major factor in the growth of the sports/fitness market as they actively participate in increasing numbers. While men still represent the largest number of active participants in most sports, growth in the market will be fueled by women, according to the National Sporting Goods Association (NSGA).

An NSGA survey showed that 88.5% of the 24.4 million people who participated in aerobics more than once were women. Of the new participants, 86.7% were women, while 13.3% were men. In running, of the 29.5 million who participated, 47.3% are women and 58.1% of new participants are female. In hiking, of 21.6 million participants, 50.4% were women and 46.7% of new participants were female.

Women are also entering competitive sports previously associated entirely with men at a high rate. Women make up 27.3% of the 21.2 million basketball participants and 38% of new participants were women. In softball, of 22.3 million participants, 39.3% were women and 46.2% of new participants were women. In racquetball, of 9.9 million participants, 33.3% were women and 43.9% of new participants were women. In soccer, of 9 million participants, 33.7% were women and 33.1% of new participants were women.

The influx of women is having a marked effect on retailing. Sporting goods stores have shifted their product mix to stay abreast of the changes. Twenty years ago a store had a product mix of 70% equipment and 30% shoes and clothing; today in many stores that ratio has been reversed. In 1980, only about 30% of athletic apparel was sold for women; in 1986 these sales accounted for 55%. Women currently buy an estimated 40% of all athletic shoes, according to industry sources, and more than 92% of aerobic shoes, 50% of running shoes.

Sport Attendance by Type of Sport, 1983 - 1985

	1985	1984	1983	% Change 1985/84	% Change 1985/83
Auto racing (e)	61,302,550	57,606,300	55,122,329	+ 6.4%	+ 11.2%
Thoroughbred racing	50,499,754	50,284,324	50,169,430	+ 0.4	+ 0.7
Major league baseball	46,838,819	44,742,863	45,540,338	+ 4.7	+ 2.9
College football	38,312,022	36,652,179	36,301,877	+ 4.5	+ 5.5
College basketball	32,056,673	31,684,078	31,471,135	+ 1.1	+ 1.9
Greyhound racing	23,966,739	22,283,902	22,090,018	+ 7.6	+ 8.5
Harness racing (e)	22,925,399	24,236,074	25,615,000	- 5.4	- 10.5
Minor league baseball	18,380,000	17,580,299	18,560,690	+ 4.5	- 1.0
Wrestling (e)	16,375,250	12,910,000	9,500,000	+26.8	+ 72.4
NFL Football	13,345,047	13,398,112	13,277,222	- 0.4	+ 0.5
NHL Hockey	12,741,230	12,466,786	12,028,832	+ 2.2	+ 5.9
College baseball	11,668,916	9,921,530	12,896,497	+17.6	- 9.5
NBA basketball	11,490,944	11,110,483	10,244,084	+ 3.4	+ 12.1
Minor league hockey*(e)	10,138,266	8,747,608	8,256,882	+15.9	+ 22.7

(e) estimated
* includes college hockey

Source: Daily Racing Forum
Survey of Sport Attendance 1983 - 1985

RETAIL SALES

Total retail sales of sporting goods, apparel and footwear are estimated to have reached about $24 billion in 1985, with apparel accounting for about $6 billion and footwear at about $2.5 billion. Estimates for 1986 are for the entire sporting goods and related products industry to remain at about the same level overall, with some segments showing increases while others show a decline.

RETAIL SALES BY STORE TYPE

The only official information on merchandise line sales in specific types of retail outlets is that made available every five years by the U.S. Bureau of the Census, based on a complete survey of all retail outlets with one or more paid employees. The most recent census, covering operations in 1982, has been released by the Bureau within the last year, and specialized reports are still scheduled for release by the Bureau.

Sales of sporting goods, as defined by the Census Bureau, include team goods sold to teams and institutions by retailers (as well as sales of team goods at retail), sports equipment (tennis, golf, ski, etc.), camping equipment, firearms, hunting equipment, trophies and plaques, bicycles, boats, and other sporting goods. Activewear is not included.

Total sales of this classification through retail outlets with payroll amounted to $13,038 million in 1982, representing a gain (in current dollars) of 38% compared with the 1977 total of $9,451 million.

A total of 70,468 retail establishments were included in the 1982 sales total. Comparable figures for 1977 are not available, however, due to a change in the treatment of leased departments, which particularly affected the counts on general sporting goods stores in 1982. In that year, the Census Bureau made a change in the treatment of leased departments. In earlier years, the data on leased departments was combined in data on the lessor stores; in 1982, however, leased departments were counted as separate retail establishments in their specific type of business. (See section on Sporting Goods Stores).

Sporting Goods & Related Product Sales By Major Type of Retail Outlet, 1982
(Establishments with payroll)

	Number of Establishments	Sales	
		Thous. $	Percent
Sporting goods & equipment, total	70,468	$13,038,094	100.0
General merchandise store group, total	14,615	2,859,631	21.9
Department stores	5,909	1,994,501	15.3
Variety stores	4,036	215,941	1.7
Misc. general merchandise stores	4,670	649,189	5.0
Boat, vehicle, automotive dealers	5,284	2,578,107	19.8
Sporting goods stores, total*	20,152	5,624,145	43.1
General line sporting goods stores	9,252	3,110,916	23.9
Specialty line sporting goods stores	10,900	2,513,229	19.3
Other retail (mail order house, hardware stores, hobby shops, etc.)	30,417	1,976,211	15.2

* Includes leased sporting goods departments operated in general merchandise stores as noted in introductory paragraph. (See section on Sporting Goods Stores)

Source: U.S. Bureau of the Census: 1982 Census of Retail Trade (RC82-1-3)

RETAIL SALES BY STORE TYPE

Activewear

Among the major store types for which sales of activewear were reported in the 1982 census of retail trade, sales amounted to over $4.9 billion. Of this total, activewear for men amounted to about $1.8 billion (with boys' included with men's sales in sporting goods stores) and for women, $3.0 billion (including girls' in sporting goods stores). Sales by major outlet type were reported as follows:

Activewear Sales By Type of Retail Outlet, 1982
(Sales in thousands of dollars)

	Total Reported		Men's		Women's	
	Sales	Percent	Sales	Percent	Sales	Percent
Activewear, total reported*	$4,846,772	100.0	$1,831,869	100.0	$3,014,903	100.0
Department stores	2,008,564	41.4	796,943	43.5	1,211,621	40.2
Apparel specialty stores:	1,901,059	39.2	491,229	26.8	1,409,827	46.7
Men's wear stores	186,023	3.8	174,505	9.5	11,518	0.4
Women's ready-to-wear stores	916,450	18.9	29,546	1.6	886,904	29.4
Women's accessory spec. stores	164,765	3.4	—	—	164,765	5.5
Family clothing stores	631,615	13.0	287,178	15.7	344,437	11.4
Children's wear stores	2,206	**	—	—	2,206	**
Sporting goods stores	937,149	19.4	543,679#	29.7	393,452##	13.1
General line	601,363	14.3	408,849	22.3	282,514	9.4
Specialty line	245,786	5.1	134,848	7.4	110,938	3.7

* Athletic footwear is not included
** Less than 0.1%
# Includes both men's and boys'
## Includes both women's and girls'

Source: Based on 1982 Census of Retail Trade reports.

Sporting Goods Stores

The 1982 census of retail trade counted 20,152 sporting goods stores with payroll in business anytime during the year, and a total of 18,590 in operation the entire year. The latter figure includes 8,709 general line sporting goods stores (46.8%) and 9,881 specialty sporting goods stores (53.2%). These two types are defined as follows:

General Line Sporting Goods Stores (SIC 5941): stores primarily selling a general line of sporting goods and equipment for hunting, camping, fishing, skiing, riding, tennis, golf, etc. Also gym and fitness equipment.

Specialty Line Sporting Goods Stores (SIC 5941): stores specializing in a maximum of four lines of sporting goods and equipment, such as guns, bicycles, trophies, skiing equipment, golf equipment, etc.

The 20,152 sporting goods stores were operated by a total of 15,907 firms. Sales totaled $7,514.9 million in 1982. (Later figures for this store type are not published by the Census Bureau).

Sporting Goods Stores (continued)

As previously noted, in 1982 leased departments were counted as separate specialty stores in their proper classification. In a supplemental report for 1982 (Miscellaneous Subjects, RC82-1-4), the Census Bureau reported a total of 2,017 leased departments operated in main stores were re-classified in the 1982 census as general line sporting goods stores. These departments were operated by two firms, the names of which were not divulged by the Bureau due to disclosure restrictions.

These leased operations had a combined total sales volume of $1,060.5 million--24.2% of the $4,377.5 million in total reported sales of general line sporting goods stores in business anytime in 1982.

The following tables profile the number and sales of sporting goods store operations in 1982:

Sporting Goods Store Firms (General Line & Specialty Line) By Total Sales Size: 1982
(Retail firms with payroll)

		Percent of Total		
	No. of Firms*	Firms	Stores	Sales
Total	14,508	100.0	100.0	100.0
Sales volume:				
$10.0 mil. or more	30	0.2	14.0	27.7
5.0 mil. - $ 9.9 mil.	59	0.4	1.5	5.4
2.5 mil. - 4.9 mil.	157	1.1	2.3	7.6
1.0 mil. - 2.49 mil.	795	5.5	6.6	16.4
Less than $1.0 mil.	13,467	92.8	75.6	42.8

* Covers 14,508 firms in operation the entire year 1982. There were 15,907 firms in operation anytime during the year, operating 20,152 stores, with sales totaling $7,514.9 million.

Sporting Goods Store Single & Multi-Unit Operations: 1982
(Retail establishments with payroll)

	Percent of Total		
	Firms	Stores	Sales
Total	100.0	100.0	100.0
Single unit organizations	91.4	72.1	52.4
Multi unit organizations	8.6	27.9	47.6
Operating: 2- 9 stores	8.4	14.4	22.7
10 or more stores	0.2	13.5	24.9

(continued)

Sporting Goods Stores (continued)

Concentration of Largest Sporting Goods Store Firms: 1982
(Dollar figures in millions)

	Stores	Sales	Percent of Total Stores	Percent of Total Sales
All firms	20,152*	$7,514.9	100.0	100.0
4 largest firms	2,290	1,389.4	11.4	18.4
8 largest firms	2,377	1,589.8	11.8	21.2
20 largest firms	2,552	1,865.6	12.7	24.8
50 largest firms	2,757	2,145.6	13.7	28.6

* Total stores in operation anytime during the year.

Sporting Goods Stores (In Operation Entire Year) By Sales Size: 1982
(Dollar figures in millions)

	Stores	Sales	Percent of Total Stores	Percent of Total Sales
Sporting goods stores:				
General line	8,709	$4,195.2	100.0	100.0
Annual sales:				
$5.0 mil. +	31	239.6	0.4	5.7
$2.5 mil.-$ 4.9 mil.	136	461.4	1.6	11.0
$1.0 mil.-$2.49 mil.	726	1,088.7	8.3	26.0
$0.5 mil.-$0.99 mil.	1,526	1,055.3	17.5	25.2
$0.25 mil.-$0.49 mil.	2,525	904.7	29.0	21.6
Under $0.25 mil.	3,767	445.5	43.3	10.6
Specialty line	9,881	$2,888.2	100.0	100.0
Annual sales:				
$2.5 mil. or more	72	307.1	0.7	10.7
$1.0 mil.-$2.49 mil.	376	551.5	3.8	19.1
$0.5 mil.-$0.99 mil.	889	600.8	9.0	20.8
$0.25 mil.-$0.49 mil.	2,015	699.8	20.4	24.2
Under $0.25 mil.	6,529	729.0	66.1	25.2

Source: U.S. Bureau of the Census:
1982 Census of Retail Trade (RC82-1-1)

Sporting Good Stores (continued)

Sporting Goods Store Sales By Merchandise Line, 1982
(Includes establishments with payroll, including Leased Departments)

	Stores		Sales of specified merchandise lines		
				Percent of total sales of—	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
General line sporting goods stores, total	9,252	100.0	$4,377,471	—	100.0
Sporting goods	9,252	100.0	3,100,916	71.1	71.1
Team equip. (institutional)	3,343	36.1	348,158	24.7	8.0
Team equip. (individuals)	7,834	84.7	380,467	10.5	8.7
Tennis equip.	6,983	75.5	295,585	8.4	6.8
Golf equipment	5,892	63.7	229,802	7.6	5.2
Snow/skiing equipment	1,651	17.8	193,558	12.7	4.4
Firearms/hunting equipment	6,110	66.0	385,041	12.2	8.8
Fishing tackle	2,643	28.6	177,568	8.9	4.1
Camping/backpacking equipment	5,908	63.8	358,654	11.3	8.2
Trophies, plaques	1,552	16.8	29,200	4.6	0.7
Bicycles, parts, accessories	423	4.6	28,798	10.1	0.7
Other sporting goods	7,544	81.5	684,085	18.2	15.6
Other merchandise lines:					
Activewear, except footwear	6,568	71.0	691,363	—	15.8
Men's & boys'	6,568	71.0	408,849	12.6	9.3
Women's & girls'	6,236	67.4	282,514	9.2	6.5
Footwear	7,164	77.4	442,247	12.7	10.1
Other merchandise, receipts	—	—	132,945	—	3.0
Specialty line sporting goods stores, total	10,900	100.0	3,137,440	—	100.0
Sporting goods	10,900	100.0	2,513,229	80.1	80.1
Team equipment (institutions)	615	5.6	35,083	19.8	1.1
Team equipment (individuals)	581	3.3	38,473	21.3	1.2
Tennis equipment	1,117	10.2	76,185	18.9	2.4
Golf equipment	2,359	21.6	410,060	66.2	13.1
Snow/skiing equipment	1,775	16.3	348,836	42.9	11.1
Fireams/hunting equipment	2,143	19.7	503,486	65.7	16.0
Fishing tackle	1,959	18.0	221,370	42.3	7.1
Camping/backpacking equipment	1,273	11.7	128,287	23.1	4.1
Trophies, plaques	355	3.3	6,577	8.8	0.2
Bicycles, parts, accessories	3,605	33.1	617,546	68.7	19.7
Other sporting goods	1,994	18.3	127,326	17.9	4.1
Other merchandise lines:					
Activewear, etc. footwear	2,493	22.9	245,786	—	7.8
Men's & boys'	2,493	22.9	134,848	15.9	4.3
Women's & girls'	2,177	22.0	110,938	15.0	3.5
Footwear	2,089	19.2	76,096	10.5	2.4
Other merchandise, receipts	—	—	302,329	—	9.6

Source: U.S. Bureau of the Census:
1982 Census of Retail Trade RC82-1-3

RETAIL SALES BY STORE TYPE

Department Stores

Department stores accounted for 15.3% of the total sales of sporting goods in retail outlets with payroll in 1982. Over half (59.2%) of the department stores reported sales of this merchandise line, with sales totaling close to $2.0 billion.

Sporting Goods & Related Product Sales in Department Stores: 1982

	Stores		Sales of specified merchandise lines		
				Percent of total sales of—	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
Department stores, total	9,981	100.0	$99,170,163	—	100.0%
Sporting goods, total	5,909	59.2	1,994,501	3.1	2.0
Bicycles, parts, accessories	5,219	52.3	585,637	1.1	0.6
Other sporting goods	5,181	51.9	1,408,864	2.4	1.4
Activewear, excl. footwear, total	—	—	2,008,564	—	2.0
Men's	6,931	69.4	796,943	1.0	0.8
Women's	6,175	61.9	1,211,621	1.6	1.2

Note: leased departments are not included in the above. Catalog mail order desk sales are included.

Each store location is separately counted in the above table. Department stores include both traditional department stores and discount department stores which meet the definition of this store type under the Standard Industrial Classification (SIC) system. Department stores operated by mail order chains and mass merchandisers are also included in the above table.

Source: U.S. Bureau of the Census: 1982 Census of Retail Trade (RC82-1-3)

NOTE: For details on department store operations, as reported in the 1982 Census, see the Fairchild Fact File: A STATISTICAL ANALYSIS OF RETAILING (1985).

Adjusted to include leased departments (not included in the 1982 Census reports on department stores), total department store sales in 1985, according to the Census Bureau, amounted to $134.7 million, 25.7% over the comparable 1982 total amounting to $107.2 million.

The NRMA reported that sporting goods contributed a typical, or median, 0.5% of sales in their reporting department stores. This is in contrast with the Census Bureau's overall figure for all department stores of 2.0%.

Department Stores (continued)

Selected Typical (Median) 1984 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Women's & Misses' Active Sportswear*	Junior Active Sportswear*	Men's Active Sportswear*	Sporting Goods
Net sales % change from last year	+ 13.9	+ 12.2	+ 13.1	+ 3.9%
Sales % to total store	1.1	0.6	1.0	0.5
Net sales % of merchandising division	4.4	2.4	7.1	7.5
$ sales per square foot of selling space	$220.3	$183.4	$235.8	$172.1
Cumulative markon, %	52.0	52.5	50.5	41.4
Gross margin, % of sales including cash discounts	44.7	44.0	40.9	30.2
Markdowns, retail, % of sales	25.9	27.7	22.9	24.1
Returns, % of sales	9.3	7.8	11.6	na
Number of stock turns	3.7	4.0	3.1	1.8
Sales people's salaries, % of sales	7.0	5.0	6.7	na
Sales promotion, % of sales	3.9	4.4	4.0	na

* Active sportswear includes swimwear, beachwear and accessories and all other summer playwear; ski jackets, pants and other winter sportswear.

Source: National Retail Merchants Association, Merchandising & Operating Results (1985 Edition).

Sporting/Athletic Goods/Bicycles

Exercise Equipment

Growth in the $1.2 billion home exercise market, which soared in the 1980-1984 period, has leveled off. However, a report by the Sporting Goods Manufacturers Association for the first quarter of 1985 showed this category to be the second largest segment (after athletic footwear) of total dollar purchases for sporting/athletic goods. Exercise cycles, multi-purpose home gym and rowing machine purchases accounted for more than 80% of sales.

Saturation of the market for some of the many diverse products comprised in this market is cited for the overall slowdown in business, though high-end equipment is doing well which appeals to the growing number of upscale young adults with substantial disposable income. Higher priced exercise bikes (over $150) increased in sales by 34% in 1984. Complete home gym systems and rowing machines, which are among the most expensive products in the fitness market mix, continue to be best-sellers.

Sporting/Athletic Goods/Bicycles

Exercise Equipment (continued)

Favorable demographic trends and continued interest in physical fitness indicate a long-term growth in the market which will adjust to the needs of maturing customers. Marketers are relying on introductions of new, more sophisticated equipment, incorporating electronic gadgets to measure heart rate, calories consumed, etc. About 30 million people claimed to use home exercise equipment of some type--everything from a $3 jump rope to a $3,000+ home gym system, according to a 1985 study. This number is expected to grow.

Tennis

The tennis market peaked in 1976 then declined until 1983, reaching a level at which demand has been fairly stagnant. According to a Gallup Organization survey, only about one in 10 adults played tennis at anytime in 1985, about half the participation rate in the peak period. The total market for tennis equipment (not including apparel and footwear) was reported at $300 million in 1985 by the National Sporting Goods Association.

Manufacturers and dealers have worked together to try to stimulate business, including sponsorships of amateur and professional matches and advertising/promotions designed specifically to attract upscale, long-time players, as well as new, younger players.

However, thus far in 1986 he decline in tennis activity seems to be continuing. The Tennis Foundation of North America reports that tennis racquets sales in the first two months of the year were 11.5% below the total in the same 1985 months.

Racquetball

Much like the tennis market, the racquetball market has remained at about the same level since 1983, with total retail sales at approximately $75 million. Following the boom in the late 1970's and early 1980's, retailers in this segment of the industry have struggled to stimulate sales.

Trade sources generally agree that the racquetball market has now stabilized and can soon begin to grow again. Estimates for 1986 are for the industry to show a growth rate of about 3% in retail sales, its biggest gain since 1982. The growing participation of women in the sport will stimulate sales. According to the National Sporting Goods Association (NSGA), about 44% of new participants in the sport in 1985 were women and they now represent a third of the 9.9 million participants.

Many facilities originally designed to cater to the racquetball clientele are now promoting other sports, such as aerobics, exercising and four-wall-volleyball to maintain usage of these facilities. Club owners are promoting free clinics and free instruction to stimulate participation, while the evolution of the racquetball clubs into multi-sport facilities has exposed more people to the sport. Manufacturers in the industry have formed the Racquetball Manufacturers Association (RMA) in order to promote the industry.

RETAIL SALES BY PRODUCT

Sporting/Athletic Goods/Bicycles

Water Sports

Swimming is the one activity, other than fitness, which can be carried out year-round on a nationwide basis, due to the great number of indoor pools, as well as outdoor pools, both public and private. It is the number one participation sport in the U.S., generating business estimated at $770 million in 1985.

Beyond swimming, new water sports have stimulated sales for dealers in areas that can benefit from the availability of sun and surf. Included is surfing, boardsailing, scuba diving, snorkeling. The fastest growth for sporting goods dealers in the right areas has been noted in boardsailing, which offers a market for a number of items, such as booms, wet suits and accessories, as well as boards; and retailers are continuing to offer a greater variety of equipment.

Hazards involved in the use of sailboards, however, are great, and the high cost of liability insurance and the fact of possible injuries will tend to cloud the future of boardsailing in many areas.

Golf

The $650 million golf equipment market reversed the one year decline in retail sales it recorded in 1984 to post a 10% increase in 1985, according to the National Sporting Goods Association. These figures it must be noted include only equipment (clubs, balls, bags) and exclude clothing ($230 million at retail) and golf shoes ($118 million).

The long range outlook for the golf industry is for continued, long-term steady growth of about 5% per year. Currently, about 18 million people play golf regularly, playing 445 million rounds per year. There are 13,181 golf courses in the U.S. and the numbers have been growing. In 1983, 104 new courses were added to the total, 136 in 1984 and 145 in 1985.

Ski

About 21 million skiers helped ring up sales of ski equipment amounting to some $550 million in 1985, while ski apparel sales were at about $320 million. Overall, a 10% increase in sales was recorded for the year. About $400 million was spent for downhill equipment (an increase of 10%) while cross country skiing recorded growth of about 5% in 1985 compared with 1984.

Marketing techniques have been sharpened over the last several years in direct response to an increasingly competitive market. Many manufacturers have turned to rebates, in-store promotion, give-aways and fit guarantees. Retailers report that the efforts of manufacturers have been successful, and have also kept discounters and diverters from establishing themselves as a force in the market.

The ski industry is, of course, dependent on snow conditions. Most areas have been lucky in the last few years, after a couple of bad seasons.

RETAIL SALES BY PRODUCT

Sporting/Athletic Goods/Bicycles

Bicycles

The bicycle market, which had been flat for a few years, was propelled into a strong growth stage in 1983 due to stronger marketing efforts of U.S. manufactures, by the overall recovery of the economy and favorable demographics. According to the National Sporting Goods Association, 10.1 million bicycles were sold in 1984 compared with 8.9 million in 1983. This marked the third straight year unit volume increased and was the industries best showing since 1973 when the oil crisis caused abut 15 million bicycles to be sold. Industry analysts expect a 10% unit volume increase in 1985.

A survey of bicycle use by adults (those age 16 and over) by the Bicycle Federation indicated the number of regular cyclists (those riding at least once a week) increase 10% in 1984; and another 10% gain was estimated for 1985. Of the some 25 million current bicycle riders, some 70% are 13 years of age or older; 18% are 25-34 years of age according to the Federation.

Bicycle manufacturers have responded to the growing adult market, as the baby boomers have matured, by shifting their model mix to lightweight models with 10 or more speeds. However, the single speed types have become increasingly popular. The best selling bicycles are the 10-18 speed lightweight, bent-handle bar racing models which account for about 40% of the market. The fastest growing segment of the market is the all-terrain, or BMX bike, which accounted for about 5% of the 10.1 million sold in 1984.

Men's Activewear

Industry analysts estimate that retail sales of apparel classified as "activewear" for men amounted to about $2.2 billion in 1985. The latest government data on retail sales of men's activewear, from the census of retail trade, reported sales through all retail outlets with payroll amounting to $1.8 billion in 1982.

Yearly estimates on growth of men's and boys' activewear sales are compiled by Kurt Salmon Associates, a New York based consulting firm.

Annual Change in Male Active Apparel Consumption, 1982 - 1986
(Percent change in units purchased)

	1986/1985(p)	1985/1984(e)	1984/1983	1983/1982
Men's activewear	+ 5%	+12%	+ 6%	+28%
Boys' activewear	+ 6	+11	+17	+25

(p) preliminary
(e) estimated

Source: Kurt Salmon Associates, Softgoods Outlook, 1986
(Based on the KSA/NPD Purchase Panel of 18,000 households)

Men's Activewear (continued)

The retail market for men's activewear has grown increasingly competitive. Sporting goods stores, which have always held a major share of apparel for active sports participants, have broadened their apparel stocks to include the active looks sought by non-participants, while department stores and chains have become more competitive in trying to attract the sports participants, and those who want to look like participants.

Trade reports indicate that the men's market has become more stratified by brand name. Sporting goods stores opt more for the authentic brands like Adidas, Nike and Puma, while department and specialty stores make their activewear statements via collections by Jantzen, Catalina, Saratoga, Jockey and other traditional sportswear makers. Many stores are increasing their private label business in an effort to offer more fashion and unique items. Warm-ups, knit shirts and pull-on pants are currently the major activewear styles. In sporting goods stores, men's specialty stores and department stores, warm-ups in all prices, from private labels to designer labels and in a variety of fabrications continue to prove their selling power, making up one-third of some stores business according to industry insiders.

As the 1986 season progresses, fashion seems to be taking second place to fabric in order to win the activewear market. Retailers report that while street activewear in on the decline, men's authentic activewear is climbing. Many manufacturers in order to gain niches in the industry are now positioning themselves as casual activewear in order to fit between the traditional activewear producers and the fashion-oriented producers.

The growth of activewear overall has caused many sporting goods stores to realign their merchandise mixes in the face of declining equipment sales. Many sporting goods stores are now reporting the softgoods, particularly apparel are now making a much larger percentage of their sales.

Women's Activewear

Market estimates on sales of women's activewear which includes "fashion" active as well as performing or functional activewear, put the category at about $3.3 billion in 1985, 10% above the $3.0 billion reported for 1982 in the Census of Retail Trade, U.S. Census Bureau. According to data from Kurt Salmon Associates, activewear for women and girls has been one of the best performing apparel categories, on a unit sales basis, since 1982. For 1986, this source estimates that women's sales will increase by about 8%, while girls' will gain 5%.

Annual Change in Female Activewear Consumption, 1982 - 1986
(Percent change in units purchased)

	1986/1985(p)	1985/1984(e)	1984/1983	1983/1982
Women's activewear	+ 8%	+ 15%	+ 16%	+ 32%
Girls' activewear	+ 5	- 6	+ 23	+ 33

(p) preliminary (e) estimated

Source: Kurt Salmon Associates,
Softgoods Outlook, 1986
Based on the KSA/NPD Purchase panel of 18,000 households

Women's Activewear (continued)

Many retailers are cutting back on their fashion orientation and are moving towards a more authentic look in the women's end of the market. Analysts cite the desire of customers for multi-function apparel as one of the main reasons for the recent trend towards the basic activewear look, as well as the lower price which comes with the basic look.

In order to cope with the swing in the market, some retailers are selling activewear in more than one location in their stores. While most are selling the fashion oriented apparel in their traditional sportswear departments, some are also adding the functional end in with their sports equipment. Fabric and construction are becoming more important in the activewear market. Retailers are citing increases in sales of materials such as fleece, velour and terry in their sports apparel.

The gain in activewear sales to women is expected to continue for the long term. Currently, more than half of all women under the age of 49 report they exercise regularly, and the numbers of women participating in sports is growing at about twice the rate of men. With more women actively participating in sports and seeking new sports to participate in, apparel sales catering to these women should continue to grow, and the popularity of the active "look" among non-participants is expected to continue.

Athletic Footwear

The total athletic footwear market, including rugged and walking shoes, as well as other types of active sports footwear, is placed by a trade source at $2.5 billion in 1985, (Footwear News, February 24, 1986). Through the rest of the 1980's growth in the athletic footwear segment is expected to average between 5-10%. Due to the heightened exposure of fashion that now characterizes this industry, however, some segments are expected to show spurts of higher growth through the last half of this decade. The biggest sales gains are expected to be in fitness shoes (high, low and three quarter heights) in solid colors, solid whites and in color trims. Losers are expected to be in running shoes and basketball shoes, while performance and leather joggers are expected to remain at about the same levels.

In order to compete in this increasingly fragmented market, many manufacturers are diversifying their product lines to penetrate smaller niches and are also seeking to differentiate themselves according to performance, styling and price point.

A glut of low-end shoes, too many models, as well as too many discount retailers and low margins are seen as the major problems facing the athletic footwear industry at the retail level.

Based on a series of purchase tracking studies among 50,000 U.S. households in three four-month periods each year, the Footwear Market Index (Kormos, Harris & Associates, Inc., Nashville, Tenn.) measures trends in the total market for athletic/tennis footwear.

(continued)

R AIL SALES BY PRODUCT

tic Footwear (continued)

The athletic footwear market includes two distinct types of footwear: tennis shoes, sneakers and the like (footwear with soles galvanized to fabric uppers) and shoes primarily of leather, including jogging, running shoes, etc. According to the FMI reports, total consumer purchases of athletic/tennis shoes in 1985 gained 18% compared with 1984. The increased participation of women in active sports and fitness programs, aerobics, as well as the increases in popularity of tennis/athletic footwear for street wear, resulted in a 21.8% increase in purchases of women's athletic/tennis shoes; men's purchases went up 19.1%; boys', 18%; girls', 1.0%.

Purchases of Adult Athletic/Tennis Footwear, 1984, 1985
(Percent of pairs)

	1985	1984
Total purchases	100.0%	100.0%
Athletic/jogging footwear	38.3	41.7
Men's	18.7	22.6
Women's	19.6	19.1
Tennis/sneakers	61.7	58.3
Men's	31.5	28.4
Women's	30.2	29.9

Purchases of All Athletic/Tennis Footwear By Classification, 1982-1985
(Percent of pairs)

	1985	1984	1983	1982
Athletic/tennis footwear, total	100.0%	100.0%	100.0%	100.0%
Men's	36.5	36.1	35.1	35.6
Boys'	18.5	18.6	18.2	20.0
Women's	36.2	35.1	36.2	33.9
Girls'	8.8	10.2	10.4	10.4

Source: Footwear Market Index.

RETAIL ADVERTISING

Monthly Distribution of Retailers' Newspaper Advertising Linage, 1982

January	1.7%	6.7%
February	3.7	6.8
March	7.2	7.9
April	10.3	8.6
May	13.2	8.0
June	12.8	7.9
July	6.3	8.3
August	9.5	10.6
September	6.7	8.7
October	6.2	6.6
November	10.9	7.8
December	11.5	12.1

Source: Newspaper Advertising Bureau,
1986 Newspaper Advertising Planbook

CONSUMER PRICES

While the overall consumer price index for goods and services rose 3.6% in 1985, the index for sporting goods and equipment rose at a slower rate of 2.1%. During 1985, the CPI for indoor and warm weather sport equipment and that of other sporting goods both registered declines.

Between February 1985 and 1986, consumer prices overall rose 3.2%, while the sporting goods CPI was up 2.1%.

Consumer Price Indexes for Specified Sporting Goods
(December 1977=100 unless otherwise indicated)

	February Average			Annual Average		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/84
All items*	327.5	317.4	+ 3.2%	322.2	311.1	+ 3.6%
Sporting goods & equipment	142.7	139.8	+ 2.1	140.9	138.0	+ 2.1
Sport vehicles	151.2	146.7	+ 3.1	148.3	143.1	+ 3.6
Indoor & warm weather sports equipment	116.9	117.6	- 0.6	117.1	117.6	- 0.4
Bicycles*	203.7	199.7	+ 2.0	201.7	199.9	+ 0.9
Other sporting goods & equip.	131.6	133.2	- 1.2	132.0	135.0	- 2.2

* 1967 = 100

Source: U.S. Department of Labor, Bureau of Labor Statistics

Men's Activewear

A recent study of the shopping preferences of 25-35 year old men, conducted by The Gallup Organization, indicated that in this group, men tend to shop for athletic apparel twice a year or less. The most frequently shopped stores were sporting goods stores and department stores while purchases tend to be less than $100.

Type of Store Usually Shopped

		Income Level	
	Total	Under $30,000	Over $30,000
Sporting goods stores	42%	35%	37%
Department stores	36	35	38
Discounters	8	13	4
Men's specialty stores	8	7	9
Mass merchants (Sears, Penney, Ward)	6	9	4
Off-price/factory outlets	2	--	3
Catalog/mail order	1	2	--
All other outlets	2	3	2
Don't know/no answer	3	3	3

Note: totals add to more than 100.0% due to multiple responses.

Men's Activewear (continued)

Frequency of Shopping for Activewear

	Total	Income Level Under $30,000	Income Level Over $30,000
Once a week	1%	--	--
Two or three times per month	3	4	2
Once a month	6	6	5
Every couple of months	15	15	15
Twice per year	24	23	27
Once per year	22	22	25
Less than once per year	12	13	9
Never	17	16	15

Annual Spending For Activewear

	Total
Less than $100	38%
$100 - $199	33
$200 - $299	14
$300 - $399	6
$400 or more	4
Don't know/no answer	5

Source: The Gallup Organization
Apparel Merchandising, October 1985

Women's Swimwear

Information on the purchase patterns for women's swimsuits is available from a survey of 1,500 women conducted the The Gallup Organization. According to this study nearly two out of three women report buying their swimsuits on sale, and are most apt to buy swimsuits in early summer.

Purchases of Women's Swimwear by Price Points

		Age of Purchaser					Income of Purchaser (thousands)			
Price Paid	Total	18-24	25-34	35-49	50-64	65+	Under $20	$20-$30	$30-$40	$40+
Less than 15%	12%	16%	16%	9%	7%	4%	17%	12%	8%	3%
$ 15 - $ 19.99	12	20	9	11	14	4	16	12	10	6
$ 20 - $29.99	38	38	46	40	31	32	37	43	48	38
$ 30 - $39.99	22	15	19	23	23	31	13	25	22	29
$ 40 - $49.99	8	3	5	11	11	11	4	7	8	14
$ 50 or more	4	8	3	2	6	—	5	1	2	9
Don't know/no answer	5	—	3	6	6	19	8	2	5	1

Women's Swimwear (continued)

Purchases of Women's Swimwear by Store Type

	Age of Purchaser						Income of Purchaser (thousands)			
	Total	18-24	25-34	35-49	50-64	65+	Under $20	$20–$30	$30–$40	$40+
Department stores	64%	55%	77%	59%	61%	57%	56%	56%	71%	82%
Mass merchandisers (Sears, Penney, Ward)	14	13	10	16	16	12	16	16	9	3
Specialty stores	11	18	11	6	13	12	10	12	11	11
Discount stores	10	7	8	17	8	4	13	13	16	3
All other stores	12	20	9	10	9	8	10	20	13	9
Don't know/no answer	2	2	—	1	—	12	4	—	2	—

Note: Columns add to more than 100.0% due to multiple responses.

Number of Swimsuits Purchased In Year

	Age of Purchaser					Region				
	Total	18-24	25-34	35-49	50-64	65+	East	Midwest	South	West
One	58%	54%	67%	59%	52%	52%	62%	52%	65%	51%
Two	12	30	10	8	5	4	13	8	12	14
Three	3	5	3	2	—	—	3	1	4	3
Four	1	2	1	2	—	—	—	1	3	—
Five or more	1	—	1	—	—	—	1	—	—	—
None	22	8	17	22	39	33	18	34	11	26
Don't know/no answer	4	2	1	7	4	12	3	4	4	7

Seasonal Trends in Women's Swimsuit Purchases

Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
100.0%	1%	3%	6%	13%	28%	36%	21%	10%	5%	2%	1%	1%

Source: The Gallup Organization
Apparel Merchandising, September 1985

Athletic Footwear

Buying practices analyzed in the Footwear Market Index (FMI) purchase tracking studies indicate that in 1984, almost 23% of men's athletic footwear (including all types) was bought primarily for wear in active sports, down from over 25% in 1983. Of women's athletic footwear bought in 1984, 23% was primarily for sports participation.

(continued)

Athletic Footwear (continued)

Principal Use of Men's & Women's Athletic Footwear, 1982-1985
(Percent of pairs purchased)

	1985	1984	1983	1982
Men: total athletic purchases	100.0%	100.0%	100.0%	100.0%
Principal use:				
Everyday/street wear	36.5	35.8	32.9	36.6
Work/school	30.0	27.8	27.2	24.1
Sports participation	18.9	22.8	25.2	26.4
Other	14.6	13.6	15.7	12.9
Women: total athletic purchases	100.0%	100.0%	100.0%	100.0%
Principal use:				
Everyday/street wear	35.6	34.6	29.2	28.5
Work/school	24.5	24.5	27.7	22.0
Sports participation	21.5	23.2	25.4	30.8
Other	18.4	17.7	17.7	18.7

Source: Kormos, Harris & Associates, Nashville, Tenn.
Footwear Market Index

Teenagers

According to a study of 1,500 teenage girls and boys nationwide conducted by Teen-age Research Unlimited, teens support their involvement in sports with purchases of equipment, apparel and footwear. For example, nearly half of teen boys polled in the study said they bought sports equipment in the last year and 22% of the girls made similar purchases. Also, 44% of girls had bought a pair of athletic shoes within the past three months.

Teens are big buyers of apparel. According to the findings, within the past three months, 49% of the males questioned and 43% of the females had purchased athletic apparel.

Selected results from the most recent survey covering information from 1985 is covered below.

Products Owned by Teenage Girls, 1985
(Base: girls age 13-19 years)

	Number (000)	Percent
Total, all girls	12,513	100.0%
Products:		
Bicycle	9,885	79.0
Golf clubs	626	5.0
Ice skates	3,629	29.0
Motor scooter	626	5.0
Skis	876	7.0
Tennis racquet	3,379	27.0

Teenagers (continued)

Products Teenage Girls Expect to Acquire
(Base: girls age 13-19 years)

	Number (000)	Percent
Total, all girls	12,513	100.0%
Products:		
Bicycle	2,377	18.0
Golf clubs	250	2.0
Ice skates	626	5.0
Motor scooter	125	1.0
Outboard motor	125	1.0
Skis	125	1.0
Tennis racquet	876	7.0

Purchase and Purchase Influence of Teenage Girls For Specified Products
(Base: all girls owning each product)

	Purchased by Teen Girl		Influenced the Purchase		Remainder of Owners
	(000)	Percent	(000)	Percent	Percent
Bicycle	1,384*	14%*	6,326	64%*	22%
Golf Clubs	213	34	200	32	34
Ice Skates	1,524	42	944	26	32
Motor Scooter	182	29	444	71	--
Skis	350	40	342	39	21
Tennis Racquet	1,216	36	912	27	37

* Read as: 1,384,000 teen girls purchased bicycles themselves -- 14% of all bicycle owners; of 64% of the owners the teen girls influenced the selection.

Source: Seventeen Magazine
1985 Youth Rand Poll

According to the 1985 Teen-age Research Unlimited survey, swimming was the most popular sport for girls between the ages 12 and 19 to participate in outside of school. Exercise/aerobics ranked second, while bicycling was third.

Teenage Girls

Activities Participated in Outside of School in Past Twelve Months
(Base: female teens 12-19)

	Number (000)	Percent
Swimming	10,210	71.7%
Exercise/aerobics	9,993	70.8
Bicycling	8,158	57.8
Baseball/softball	7,283	51.6
Jogging/running	7,185	50.9
Roller skating	6,324	44.8
Tennis	6,267	44.4
Basketball	6,084	43.1
Bowling	6,055	42.9
Fishing	4,827	34.2
Horseback riding	4,164	29.5
Camping/backpacking	4,093	29.0
Sailing/boating	3,868	27.4
Ice skating	3,599	25.5

Source: Seventeen Magazine,
Teen-age Research Unlimited, 1985

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now--1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumber buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S.mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change. For orders and further information, please write to:

FAIRCHILD FACT FILES,
Fairchild Books,
7 East 12th Street, New York, N.Y. 10003

C3400-1 89-U

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

Home Textiles

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

TABLE OF CONTENTS

Page

MARKET TRENDS.......... 1

AT THE MANUFACTURER LEVEL:

- GENERAL INDUSTRY STATISTICS.......... 2
  - EMPLOYMENT & EARNINGS.......... 4
  - INDUSTRY CONCENTRATION.......... 5
  - LOCATION OF THE INDUSTRY.......... 9
- PRODUCTION.......... 11
  - MATERIALS CONSUMED IN PRODUCTION.......... 12
- PRODUCT SHIPMENTS.......... 15
- FOREIGN TRADE.......... 24
  - TOTAL SUPPLY.......... 25

AT THE RETAIL LEVEL:

- THE POTENTIAL MARKET: HOUSEHOLDS & HOUSEHOLD EXPENDITURES.......... 26
- RETAIL SALES BY STORE TYPE.......... 27
- RETAIL SALES BY PRODUCT.......... 32
- CONSUMER PRICE INDEX.......... 41
- RETAIL ADVERTISING.......... 41
- CONSUMER BUYING HABITS.......... 41

SCHEDULE OF ADDITIONAL FACT FILES.......... 43

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for cutomers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add up to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright © 1986 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-553-4

Printed in the United States of America

HOME TEXTILES & RELATED PRODUCTS

Market Trends

A major change has occurred in the profile of the home textiles industry in the U.S. as of early 1986. Through acquisitions, six major mills have become three megamills. They are Springs/Lowenstein, Stevens/Burlington and Fieldcrest/Cannon. Within the space of a few weeks the entire competitive picture within this market has completely changed, with changes still evolving, as operations become integrated.

At the same time, major consolidations have been underway at the retail level which are resulting in a consolidation of buying power. In addition, some large department stores (such as Gimbels), which had catered to middle-income customers are going out of business, leaving that field to large, successful discount chains, such as Caldor, Marshall's and Zayre, while higher-priced, upscale department stores were able to maintain earnings. The mills must now adapt not only to vast changes in their operations, but also in their retailer-customer bases.

Bigger mills, representing a sizeable share of total supply, have a better chance of pushing really innovative programs through the stores. On the other hand, buyers in consolidated operations have more clout. The small independent retailer may be the loser.

The year 1985 was not a good one for sheet/pillowcase producers, as a whole. Unit shipments were down 7% compared with 1984, and the value of shipments declined almost 3%. Quality, higher-priced merchandise of all types did best last year, and home textiles were not an exception. Mill shipments of high-count sheets and of all-cotton sheets registered strong gains. Shipments of finished terry towels by U.S. mills last year declined 1.3% in quantity and 2.8% in value compared with 1984.

The total retail market for home textiles and related products is estimated at about $12 billion. With an improved economy and a rise in disposable income, plus lower interest rates and a surge in new home or replacement home sales, the outlook for home textiles is more favorable than it has been for sometime. Megamills are positioned to take good advantage of this. Retailers are getting better control of promotions, becoming more selective in designer name offerings and in price points.

An analysis by Kurt Salmon Associates early this year looked for an increase of 2% in units purchased by consumers in 1986, following a 1% decline in 1985 compared with 1984, and a 4% decline in 1984 from the previous year.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

A complete census of all manufacturers in the U.S. which have one or more paid employees is compiled every five years by the U.S. Bureau of the Census. Results from the latest, covering operations in the industries primarily involved in the production of home textiles and related products in the year 1982, are covered below. In addition, comparable figures are reported from the 1983 annual survey of manufactures. The Census Bureau conducts annual surveys using a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity during intercensal periods.

The value of shipments and miscellaneous receipts in the curtain and drapery industry in 1983 amounted to $1,098 million, a gain of 3.4% compared with the 1982 total, and 8.4% over the total reported in 1977. Shipments and miscellaneous receipts in the home textiles (not elsewhere classified industry) were reported at $3,440.6 million in 1983, which was 5.5% above the 1982 total and 50% greater than the value reported for 1977, as measured in current-value dollars.

Curtains & Draperies
(SIC 2391*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	1,327	1,650	--
Number of establishments	1,294**	1,371	1,712	- 5.6%
Number with 20 or more employees	238**	254	324	- 6.2
Employees, total (thous.)	24.0	24.1	31.7	- 0.4
Production workers (thous.)	19.8	19.7	27.2	+ 0.5
Payroll (mil. $)	$ 232.5	$ 233.7	$ 224.7	- 0.5
Value added by manufacture (mil. $)#	462.0	442.1	407.3	+ 4.5
Value of industry shipments (mil. $)##	1,098.0	1,062.0	1,013.1	+ 3.4
Capital expenditures, new (mil. $)	4.0	6.3	7.2	- 36.5

Home Textiles, n.e.c.
(SIC 2392*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	882	980	--
Number of establishments	910**	958	1,051	- 5.0%
Number with 20 or more employees	384**	399	403	- 3.7
Employees, total (thous.)	46.8	49.3	47.5	- 5.1
Production workers (thous.)	37.8	39.8	39.8	- 5.0
Payroll (mil. $)	$ 503.8	$ 518.2	$ 366.4	- 2.8
Value added by manufacture (mil. $)#	1,307.4	1,249.0	782.9	+ 4.7
Value of industry shipments (mil. $)##	3,440.6	3,262.2	2,294.0	+ 5.5
Capital expenditures, new (mil. $)	25.0	38.8	26.9	- 35.6

(continued)

GENERAL INDUSTRY STATISTICS

Drapery Hardware, Blinds & Shades
(SIC 2591*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	404	435	--
Number of establishments	427**	435	456	- 1.8
Number with 20 or more employees	119**	127	85	- 6.3
Employees, total (thous.)	16.8	15.7	13.6	+ 7.0
Production workers (thous.)	12.5	11.7	10.3	+ 6.8
Payroll (mil. $)	$ 257.5	$ 223.7	$ 145.6	+ 15.1
Value added by manufacture (mil. $)#	712.4	556.6	345.0	+ 28.0
Value of industry shipments (mil. $)##	1,332.1	1,114.4	675.1	+ 19.5
Capital expenditures, new (mil. $)	18.7	31.3	16.7	- 40.2

n.e.c. not elsewhere classified
na not available

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

** County Business Patterns 1983, U.S. Bureau of the Census. (Each business location is separately counted as an "establishment").

SIC 2391 covers establishments with one employee or more primarily engaged in manufacturing curtains and draperies from purchased materials. Manufacturers of lace curtains made on lace machines are not included.

SIC 2392 (officially designated "House Furnishings, n.e.c.") covers establishments with paid employees primarily engaged in manufacturing home textiles from purchased materials, including towels, sheets, blankets, comforters, bedspreads, pillowcases, pads; also slip covers, tablecloths (fabric and plastic), pillows, mops, garment bags, etc. Weaving mills which also produce finished home textile products (sheets, tufted bath mats, blankets, etc., are not included in this industry, nor are electric blankets (made in electric housewares industry).

SIC 2591 covers establishments with paid employees primarily engaged in manufacturing curtain and drapery rods, poles and fixtures, venetian blinds and other window blinds and shades, regardless of the materials used, except canvas shades and awnings.

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

## Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in these industries. The value of primary products alone of these industries, plus the value of shipments by manufacturers classified in other industries is covered in the section on PRODUCT SHIPMENTS.

Source: U.S. Bureau of the Census, Census of Manufactures, 1982, 1977
Annual Survey of Manufactures, 1983

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Average employment in the curtains and draperies industry declined 2.6% in 1985 compared with 1984, following a 6.4% gain noted for the year 1984 compared with 1983. Comparable figures for production workers indicated a 4.1% drop in 1985 vs. a 6.9% rise in 1984.

In the home textiles industry, total employment in U.S. mills averaged 50.5 thousand last year, down 3.6% compared with the 1984 level. The same decline was noted in the average number of production workers in the industry. In 1984 compared with 1983, total employment averaged 4.8% above the 1983 level while production worker employment averaged a gain of 5.9%.

Some differences will be noted for average employment data on an annual basis compiled by the U.S. Bureau of Labor Statistics and by the U.S. Census Bureau due to a difference in methodology in compiling this data.

Employment & Earnings in the Home Textiles Industry

	Annual Averages				% Change	
	1985	1984	1983	1982	1985/82	1985/84
Curtains & draperies (SIC 2391)						
All employees (thous.)	25.9	26.6	25.0	24.0	+ 7.9%	- 2.6%
Production workers (thous.)	20.9	21.8	20.4	19.5	+ 7.2	- 4.1
Avg. weekly earnings	$202.45	$195.38	$188.44	$162.75	+24.4	+ 3.6
Avg. hourly earnings	5.37	5.21	4.92	4.65	+15.5	+ 3.1
Avg. weekly hours	37.7	37.5	38.3	35.0	+ 7.7	+ 0.5
Home textiles, n.e.c.(SIC 2392)						
All employees (thous.)	50.5	52.4	50.0	47.1	+ 7.2	- 3.6
Production workers (thous.)	43.1	44.7	42.2	39.0	+10.5	- 3.6
Avg. weekly earnings	$223.85	$215.99	$212.07	$195.14	+14.7	+ 3.6
Avg. hourly earnings	5.86	5.61	5.41	5.19	+12.9	+ 4.4
Avg. weekly hours	38.2	38.5	39.2	37.6	+ 1.6	+ 0.8

n.e.c. not elsewhere classified

Source: Bureau of Labor Statistics, *Employment & Earnings*

Industry Concentration

The structure of the linens/domestics segment of the home textiles industry has undergone a vast change in recent months. The problems the industry had been encountering are attributed to too many mills, resulting in overproduction, underutilization of mills, declining sales, poor profitability and inroads by imports. At the same time, changes in the competitive nature of the retail market, involving the growing importance of the large chains and upscale mass merchants who were pushing into areas usually dominated by department stores, on one hand, and the growing importance of another tier -- the discounters, and wholesale clubs -- put pressure on mills to control brand names that would fill each niche, without encroaching on each other. Mergers and consolidations seemed to offer a solution to some of these problems.

GENERAL INDUSTRY STATISTICS

Industry Concentration

In the latter part of 1985 and early 1986, three mill acquisitions completely changed the linens and domestics industry and the competitive picture. Six major producers suddenly become three "megamills" controlling upwards of 70% of the linens/domestics market.

The first of the three consolidations was the acquisition of M. Lowenstein Corp. by Springs Industries. Springs, which was already the dominant factor in the overall sheeting market, with a 28-30% share through its broad-based Middle America lines, obtained through this acquisition Lowenstein's Wamsutta brand of high thread count and all-cotton fashion sheets which have a strong position in upstairs departments, as well as its Pacific line which is geared to the mass market.

This news was just being absorbed when two more major consolidations quickly followed. In December 1985, Fieldcrest Mills, Inc. signed an agreement to buy the home textiles operation of Cannon Mills Co. (reported to be doing between $500 million and $600 million in annual sales). The purchase involved Cannon's towel, sheet, bedding, accessory, kitchen products and rug operations (as well as its 12 stores).

Total sales for Fieldcrest/Cannon's combined bed and bath business grew to slightly more than $1 billion, making this the nation's largest manufacturer of towels and the third largest producer of sheets. Through this purchase, Fieldcrest acquired some of the most modern equipment in the industry, including state-of-the-art sheeting and towel looms which produce goods that previously could only be obtained abroad -- such as jacquard towels, fiber-reactive beach towels and ultra-high-count sheets.

Fieldcrest already had the biggest share of department store solid terry business through its Royal Velvet line, and an overall 25% of department store towel business. Cannon was reported to have a 24% share of department store towel business, but its share of this business among mass merchants was put at 32% compared with Fieldcrest's 9%.

Fieldcrest's sheeting operation became greatly updated by the acquisition of Cannon, which had emphasized design, pricing and production of a variety of sheets in sub-counts and high-counts. Fieldcrest was reported to have an estimated 6 to 8% share in the department store sheeting market at the time of the acquisition, but Cannon's Monticello sheets commanded the leading position among mass merchandisers (20%) compared to Fieldcrest's St. Mary's brand which was reported to have a stake of less than 10%.

The industry's third megamill was created with the purchase by J.P. Stevens & Co. of Burlington's $200-million domestics division early this year. Again the competitive picture was revamped.

Stevens already had a formidable hold on the all-important mass merchant arena, while Burlington had made impressive gains among lower tier retailers with its trendy American Lifestyle sheet collections, juvenile patterns and waterbed lines. For the upscale market, Stevens acquired through Burlington the Laura Ashley lines, one of the most successful upstairs lines, with a retail volume expected to hit a record $200 million in 1986. Burlington had also scored a major coup by attaining the licensing rights for a line of sheets by Pierre Cardin, who is believed to have the broadest consumer recognition of all designers. For its part, Stevens had launched one of the industry's major designer collections, in Ralph Lauren.

GENERAL INDUSTRY STATISTICS

Industry Concentration (continued)

The Burlington acquisition made Stevens the second largest producer in both sheeting and in towels.

The trade publication HFD has compiled estimates on the changing line-up of sheet and towel producers in the U.S. due to the recent acquisitions.

Before Springs-Lowenstein Merger			After Stevens-Burlington Merger		
SHEETS					
Rank	Mill	Market Share	Rank	Mill	Market Share
1.	Springs	18%	1.	Springs/Lowenstein	27%
2.	Stevens	16	2.	Stevens/Burlington	26
3.	Cannon	15	3.	Fieldcrest/Cannon	20
4.	WestPoint/Pepperell	14	4.	WestPoint/Pepperell	14
5.	Burlington	10	5.	Dan River	6
6.	Lowenstein	9	6.	Bibb	4
7.	Dan River	6	7.	Thomaston	2
8.	Fieldcrest	5			
9.	Bibb	4			
10.	Thomaston	2			
TOWELS					
1.	Cannon	30	1.	Fieldcrest/Cannon	47
2.	Stevens	19	2.	Stevens/Burlington	22
3.	Fieldcrest	17	3.	WestPoint/Pepperell	15
4.	WestPoint/Pepperell	15	4.	Dundee	8
5.	Dundee	8			
6.	Burlington	3			

Source: HFD (The Weekly Homefurnishings Newspaper)
January 20, 1986

The industry and market are not in a period of readjustment in response to the formation of the three megamills. The extent to which operations have been centralized thus far has varied. Springs and Wamsutta are reported to be the least consolidated. Stevens, on the other hand, has fully integrated Burlington's product lines under the Stevens umbrella and Fieldcrest has aligned Cannon's marketing and manufacturing staff with its own.

Meanwhile, there have been major consolidations at the retail level -- such as the merger of Federated's Richway division with Gold Circle and Shillito-Rike's with Lazarus, the consolidation of buying for Macy's Davison's group with New York stores, etc. -- all increasing the concentration of buying power and altering the mills' sales tactics. Mills now represent a smaller resource base, a larger share of available supply. Still to be determined is the extent to which large retail organizations will be willing to commit themselves to a single supplier of all classifications in home textiles.

GENERAL INDUSTRY STATISTICS

Industry Concentration (continued)

In the domestic curtain and drapery industry, a few big manufacturers are getting bigger. Burlington is the largest producer of draperies, with a 40% share of the market. It is also the leading domestic producer of scatter rugs and of damask mattress ticking. Aberdeen Mfg. Co. ranks second, followed by Arley Merchandise Corp. Arley, which went public in 1985, concentrates on the mass merchants and chain stores, but plans to increase the share of business it does with department stores, particularly with their bed-coverings lines, which were reported to account for about 20% of their total business in 1985.

Aberdeen Mfg., which under the Crown Home Furnishings umbrella has one of the most diversified lines of any manufacturer in the industry (especially when the output of its sister company, Cameo Curtains, is considered) produces both high- and low-end curtains, draperies, bedspreads, comforters, shower curtains, sheets and kitchen products.

As part of the complete census of manufactures covering operations in 1982, the U.S. Census Bureau has compiled data on industry concentration levels. In view of the recent consolidations in the linens/domestics industry, the 1982 figures for that segment are now academic, but may provide some useful background information.

Type of Company Ownership & Share of Shipments, 1982

	No. of Companies	Plants		Employees		Value of Industry Shipments	
		No.	%	Thous.	%	Thous.$	%
Curtains & draperies	1,328	1,371	100.0	24.1	100.0	$1,062.0	100.0
Multiunit companies	71	114	8.3	10.6	44.0	550.9	51.9
Single-unit companies	1,257	1,257	91.7	13.5	56.0	511.1	48.1
Home Textiles, n.e.c.	880	958	100.0	49.3	100.0	3,262.2	100.0
Multiunit companies	123	201	21.0	33.0	66.9	2,374.2	72.8
Single-unit companies	757	757	79.0	16.3	33.1	887.9	27.2
Drapery hardware, blinds, shades	404	435	100.0	15.7	100.0	1,114.4	100.0
Multiunit companies	34	65	14.9	11.2	71.3	838.1	75.2
Single-unit companies	370	370	85.1	4.5	28.7	276.2	24.8

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Type of Organization, Subject Series MC82-S-5

Industry Concentration (continued)

Share of Industry Shipments Accounted For By the Largest Manufacturing Companies, 1977, 1982

Industry	No. of Companies	Value of Shipments				
		Total (Mil. $)	% Share Accounted For By Largest Companies			
			Top 4	Top 8	Top 20	Top 50
Curtains & draperies						
1982	1,328	$1,062.0	22%	35%	48%	61%
1977	1,650	1,013.1	26	36	49	62
Home textiles, n.e.c.						
1982	880	3,262.2	23	33	49	65
1977	980	2,294.0	22	33	48	66
Drapery hardware, blinds, shades						
1982	404	1,114.4	43	62	75	85
1977	435	675.1	46	65	81	89

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Concentration Ratios in Manufacturing, Subject Series MC82-S-7

Industry Statistics By Employment Size of Plants, 1982

Industry	Plants		Employment		Value Added by By Manufacture		Value of Shipments	
	Number	%	Number	%	Mil. $	%	Mil. $	%
Curtains & draperies	1,371	100.0%	24.1	100.0%	$ 442.1	100.0%	$1,062.0	100.0%
Plants with average employment of —								
1 - 19 employees	1,117	81.5	5.6	23.2	98.8	22.3	216.3	20.4
20 - 99 employees	212	15.5	8.8	36.5	154.9	35.0	365.7	34.4
100 or more employees	42	3.0	9.7	40.2	188.4	42.7	480.0	45.2
Home textiles, n.e.c.	958	100.0	49.3	100.0	1,249.0	100.0	3,262.2	100.0
Plants with average employment of —								
1 - 19 employees	559	58.4	3.5	7.1	98.0	7.8	249.9	7.7
20 - 99 employees	272	28.4	12.0	24.3	291.1	23.3	753.3	23.1
100 or more employees	127	13.2	33.8	68.6	859.9	68.9	2,259.0	69.2
Drapery hardware, blinds, shades	435	100.0	15.7	100.0	556.6	100.0	1,114.4	100.0
Plants with average employment of —								
1 - 19 employees	308	70.8	10.8	68.6	49.9	9.0	102.9	9.2
20 - 99 employees	95	21.8	3.7	23.6	107.9	19.4	231.6	20.8
100 or more employees	32	7.4	1.2	7.6	398.8	71.6	779.9	70.0

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, General Summary, Subject Series MC82-S-1 (Part 2)

GENERAL INDUSTRY STATISTICS

Location of the Industry

Industry Statistics For Leading States

	All Plants		All Employees		Value Added By Manufacture*	
Industry	Total	With 20+ Employees	No. (thous.)	%	Mil. $	%
Curtain & drapery	1,371	254	24.1	100.0%	$442.1	100.0%
Leading States						
California	319	43	3.3	13.7	57.5	13.0
Georgia	31	12	1.4	5.8	36.9	8.3
Massachusetts	51	29	2.8	11.6	53.6	12.1
New York	109	28	1.8	7.5	49.8	11.3
North Carolina	34	14	3.6	14.9	56.4	12.8
Texas	100	16	1.7	7.0	30.1	6.8
Home textiles, n.e.c.	958	399	49.3	100.0	1,249.0	100.0
Leading States						
Alabama	16	10	2.4	4.9	114.7	9.2
California	141	48	4.5	9.1	119.3	9.5
Georgia	45	28	4.0	8.1	109.1	8.7
New York	195	77	9.2	18.7	152.8	12.2
North Carolina	68	41	7.6	15.4	211.0	16.9
South Carolina	25	16	5.3	10.7	108.8	8.7
Drapery hardware, blinds, shades	435	127	15.7	100.0	557.6	100.0
Leading States						
California	57	20	2.6	16.6	77.1	13.8
New Jersey	23	9	1.5	9.5	50.8	9.1
New York	74	15	1.1	7.0	65.4	11.7
Texas	30	10	0.7	4.4	53.9	9.7

* For explanation of this value, see page 3. The total value of product shipments (all producers) by leading state is covered in the PRODUCT SHIPMENTS section.

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census, 1982 Census of Manufactures
Industry Series MC82-1-23E, -1-25B

PRODUCTION

Summary of Production of Sheets, Pillowcases & Terry Towels: 1975-1985
(Thousands of dozens)

	Sheets				
Year	Crib	Flat	Fitted	Pillowcases	Terry Towels
1985	543	8,925	6,023	13,174	44,974
1984	653	10,149	6,324	15,147	46,954
1983	824	10,232	6,739	14,950	49,742
1982	642	8,937	5,908	12,382	41,117
1981	641	10,102	6,669	14,441	44,931
1980	694	9,932	6,599	14,694	43,957
1979	695	9,770	6,102	14,257	47,118
1978	659	10,310	6,494	13,727	44,976
1977	632	9,711	6,573	13,950	45,124
1976	732	9,836	6,968	13,964	45,556
1975	683	9,092	6,344	12,337	41,442

Source: U.S. Bureau of the Census,
Current Industrial Reports (MQ23X(85)-5

Figures on production of other types of home textiles are included in the annual report, Cotton Counts Its Customers, issued by the National Cotton Council of America.

Production of Selected Home Textiles by Type: 1984, 1985

	Unit of Measure	1985(p)	1984	% Change 1985/1984
Curtains, excluding shower	1,000 sets	120,300	120,214	+ 0.1%
Lace		2,398	2,098	+14.3
Other, principally woven		117,902	118,116	- 0.2
Cafe, tiered & cottage		63,667	65,443	- 2.7
Ruffled		5,895	6,212	- 5.1
Shortie drapes		12,969	12,324	+ 5.2
Tailored		35,371	34,137	+ 3.6
Drapery, upholstery & slip cover fabrics	1,000 lin. yds.	897,000	894,529	+ 0.3
Drapery fabrics		492,000	491,158	+ 0.2
Mainly woven		428,000	427,094	+ 0.2
Lining, woven		64,000	64,064	- 0.1
Upholstery & slip cover fabrics	1,000 lin. yds.	405,000	403,371	+ 0.4
Coated		56,700	60,506	- 6.3
Knit		15,876	16,942	- 6.3
Woven		40,824	43,564	- 6.3
Uncoated, woven		349,300	342,865	+ 1.9
Window shades, woven, plastic & nonwoven	1,000 units	23,695	23,005	+ 3.0
Wall covering fabric (woven & nonwoven)	1,000 sq. yds.	169,990	177,073	- 4.0

(continued)

Production of Selected Home Textiles by Type: 1984, 1985
(continued)

	Unit of Measure	1985(p)	1984	% Change 1985/1984
Slip covers, furniture, excluding plastic	1,000 sets	6,200	6,526	- 5.0%
Knit		4,959	5,221	- 5.0
Slip covers		1,983	2,088	- 5.0
Throw covers		2,976	3,133	- 5.0
Woven		1,241	1,305	- 4.9
Slip covers		112	562	- 80.1
Throw covers		595	117	+408.5
Sleep covers		534	626	- 14.7
Comforters & quilts, excluding filling	1,000 units	19,664	18,728	+ 5.0
Bedspreads	1,000 units	27,202	26,696	+ 1.9
Tailored		16,971	16,477	+ 3.0
Tufted		2,000	1,980	+ 1.0
Woven		8,231	8,239	- 0.1
Jacquard		3,189	3,254	- 2.0
Other woven		5,042	4,985	+ 1.1
Mattress coverings, woven & plastic	1,000 units	2,654	2,628	+ 1.0
Pads, quilted, excluding fillings	1,000 units	29,228	27,771	+ 5.2
Bassinet, crib & furniture, woven & plastic		5,340	5,235	+ 2.0
Mattress, woven		23,888	22,536	+ 6.0
Pillows & cushions, excluding fillings, woven	1,000 units	42,395	40,793	+ 3.9
Bed		22,576	21,918	+ 3.0
Decorative		19,819	18,875	+ 5.0
Textile table cloths, napkins & place mats, excluding plastic	1,000 sq. yds.	129,656	132,789	- 2.4
Damask		17,475	17,649	- 1.0
Lace		21,440	21,592	- 0.7
Other, woven		90,741	93,548	- 3.0
Coated		19,514	20,118	- 3.0
Uncoated		71,227	73,430	- 3.0

(continued)

Production of Selected Home Textiles by Type: 1984, 1985
(continued)

	Unit of Measure	1985(p)	1984	% Change 1984/1983
Blankets & blanketing	1,000 lin. yds.	85,573	84,754	+ 1.0%
Bed		78,727	77,126	+ 2.1
Thermal woven		25,980	23,909	+ 8.7
Cotton		7,364	5,260	+40.0
Other		18,616	18,649	- 0.2
Other woven & non-woven		52,747	53,217	- 0.9
Cotton & cotton blends		8,967	9,579	- 6.4
Other		43,780	43,638	+ 0.3
Crib & receiving		6,846	7,628	-10.2
Thermal woven		1,095	1,144	- 4.3
Cotton		164	172	- 4.6
Other		931	972	- 4.2
Other woven & non-woven		5,651	6,484	-11.3
Cotton & cotton blends		4,601	5,057	- 9.0
Other		1,150	1,427	-19.4

(p) preliminary

Source: National Cotton Council of America, Cotton Counts Its Customers, 1986 Edition.

Materials Consumed in Production

The 1982 census of manufactures reports include the cost of materials consumed or put into production by plants classified in home textiles and related products industries for that year.

Materials Consumed By the Home Textiles & Related Products Industry, 1982

	Curtains & Draperies		Home Textiles, n.e.c.	
	Quantity	Delivered Cost (mil. $)	Quantity	Delivered Cost (mil. $)
Materials, supplies, total	--	$ 568.9	--	$1,849.5
Broad woven fabrics (mil. lin. yds.)				
Primarily --				
Cotton	38.5	42.0	203.4	262.7
Rayon & acetate	36.4	53.6	na	19.4
Nylon	na	1.8	na	6.1
Polyester	130.2	131.7	297.2	316.0
Other fabrics	50.7	69.9	154.5	166.1
Plastics coated, impregnated or laminated fabrics	--	--	na	22.9
Manmade fibers (staple & tow) (mil. lbs.)	--	--	48.3	40.4
Plastic products (sheets, rods, tubes, etc.)	--	--	--	21.5
All other materials, components, supplies	--	269.9	--	994.4

(continued)

Materials Consumed in Production

Materials Consumed By the Home Textiles & Related Products Industry, 1982
(continued)

	Drapery Hardware, Blinds, Shades	
	Quantity	Delivered Cost (mil. $)
Materials, supplies, total	--	$ 460.1
Mill shapes & forms:		
Steel	--	105.2
Aluminum & aluminum-base alloy	--	91.3
Plastic coated fabric & shade cloth (mil. lin. yds.)	27.7	42.6
Cordage (mil. lin. ft.)	466.6	8.0
Woven narrow tape & webbing (mil. lin. ft.)	170.8	13.7
Plastic sheets, rods, tubes, etc.	--	41.4
All other materials, components, supplies	--	157.9

n.e.c. not elsewhere classified
na not available

Source: U.S. Bureau of the Census, 1982 Census of Manufactures
Industry Series MC82-1-23E, 1-25B

Fibers

There has been a definite swing on the part of consumers toward natural fibers, and cotton's share of the U.S. market for home textiles increased in 1985 as mills promoted all-cotton products or higher cotton blend levels. Cotton has also become more competitively priced. In 1980, cotton cost 27% more than polyester; in 1985 it cost only 6% more due to large supplies and cost-saving innovations developed by planter-shippers. Now, new farm legislation, increasing U.S. government price supports for U.S. growers as of August 1, 1986, is expected to reduce costs for domestically produced cotton to world levels, effectively reducing its price from the current 56 cents a pound to the mid 40's or less.

This is expected to have a great effect on home textiles, particularly on the fiber blend levels to be introduced by major sheet mills in 1987. Polyester, the man-made fiber blended so often with cotton in home textiles, and as of June 1986 priced at about 63 cents, will be under some additional price pressure. While all-cotton sheets and cotton-rich blends have had a strong share of the upscale market, the mass market will be able to trade up to cotton when the new price structure becomes effective. The polyester fiber interests, on the other hand, can be expected to strongly promote the specific advantages offered by this fiber. The problems of the polyester fiber suppliers are, however, compounded by the consolidation of the mills which are already in the process of redefining their markets and their suppliers.

PRODUCTION

Materials Consumed in Production

Fibers (continued)

The Textile Economics Bureau Inc. compiles an annual report on fiber consumption by end-use markets, which is published in the September issue of Textile Organon, and in the Man-Made Fiber Producers' Handbook. At the date of the compilation of this Fact File, the latest figures available are for the year 1984.

Fiber Consumption in Specified Home Textiles, 1980, 1984

	1984		1980	
	Mil. Pounds	Percent	Mil. Pounds	Percent
Bedspreads, quilts (1)	129.3	100.0%	128.2	100.0%
Man-made fibers	81.2	62.8	73.0	56.9
Cellulosic	10.0	7.7	7.5	5.8
Noncellulosic	71.2	55.1	65.5	51.1
Cotton	48.1	37.2	55.2	43.1
Blankets & blanketing (2)	67.0	100.0	109.1	100.0
Man-made fibers	50.9	76.0	97.2	89.1
Cellulosic	0.2	0.3	2.0	1.8
Noncellulosic	50.7	75.7	95.2	87.3
Cotton	11.1	16.6	7.9	7.2
Wool	5.0	7.5	4.0	3.7
Sheets & other bedding (3)	516.8	100.0	507.9	100.0
Man-made fibers	300.0	58.0	263.8	51.9
Cellulosic	15.5	3.0	11.7	2.3
Noncellulosic	284.5	55.0	252.1	49.6
Cotton	216.8	42.0	244.1	48.1
Towels & toweling (4)	361.5	100.0	328.5	100.0
Man-made fibers	30.3	8.4	35.3	10.7
Cellulosic	0.7	0.2	0.9	0.3
Noncellulosic	29.6	8.2	34.4	10.4
Cotton	331.2	91.6	293.2	100.0
Curtains (5)	100.8	100.0	89.5	30.5
Man-made fibers	91.2	90.5	80.1	27.3
Cellulosic	10.8	10.7	11.5	3.9
Noncellulosic	80.4	79.8	68.6	23.4
Cotton	9.6	9.5	9.4	3.2
Drapery & Upholstery (6)	500.0	100.0	487.9	100.0
Man-made fibers	327.8	65.5	328.8	67.4
Cellulosic	92.7	18.5	128.5	26.3
Noncellulosic	235.1	47.0	200.3	41.1
Cotton	155.9	31.2	147.7	30.3
Wool	16.3	3.3	11.4	2.3

(footnotes continued)

PRODUCTION

Materials Consumed in Production

Fibers (continued)

Note: Noncellulosic yarn includes textile glass.
(1) Includes tailored and throw spreads, both tufted and woven, as well as backing; comforters and their outer shell.
(2) Woven, knitted, needle-punched and flocked full-size and crib blankets, electric blanket shells, as well as bindings.
(3) Includes sheets and pillowcases; also outside cover of quilted pads, mattress pads, mattresses and springs, civilian cots and sleeping bags.
(4) Woven hand, bath, dish towels, etc. Nonwoven towels are not included.
(5) Lace and other types of cafe, tiered, cottage, etc. curtains.
(6) Includes furniture slipcovers and vinyl coated cotton fabrics for upholstery, as well as drapery fabrics, backing and headers.

Source: Textile Economics Bureau, Inc.:
Textile Organon (Sept. 1985)

PRODUCT SHIPMENTS

Data on industry shipments, as previously noted, cover the value of primary products shipped by manufacturers in the industry classification plus the value of secondary products, contract work and miscellaneous receipts. Product shipments, however, as reported by the Census Bureau cover the value of specific products by all manufacturers, regardless of their industry classification based on their primary product.

Data from the 1982 census of manufactures and the 1983 annual survey of manufactures provide the most detailed information currently available on all types of home textiles and related products. In addition, the Census Bureau's *Current Industrial Reports* series provides quarterly and annual reports on production and shipments of sheets, pillowcases and towels, covering all manufacturers in the U.S.

Quality & Value of Shipments of Sheets & Pillowcases by U.S. Mills: 1984, 1985

	Quantity (thous. dozens)		Value (millions of $)	
	1985	1984	1985	1984
Sheets & pillowcases	29,297	31,493	$1,184.8	$1,232.6
Crib size	559	637	18.4	20.6
Sheets, excluding crib	15,261	16,218	918.3	948.5
Flat sheets	9,019	9,906	550.1	581.4
Fitted sheets	6,242	6,312	368.2	367.1
Thread count:				
195 & over	817	603	78.3	54.0
180 to 194	7,192	7,383	461.4	475.9
135 to 179	1,283	1,488	78.0	92.8
125 to 134	2,457	2,761	127.3	137.1
Under 125	3,512	3,983	173.3	188.8

(continued)

Quality & Value of Shipments of Sheets & Pillowcases by U.S. Mills: 1984, 1985

(continued)

	Quantity (thous. dozens)		Value (millions of $)	
	1985	1984	1985	1984
Sheets & pillowcases (cont'd.)				
Fabric:				
Polyester/cotton blends	14,430	15,808	$ 837.4	$ 910.8
Other fabrics	831	410	80.9	37.7
Size:				
King	1,627	1,649	151.2	153.5
Queen	3,069	3,171	223.8	229.1
Full	4,789	5,651	276.9	305.7
Twin	5,199	5,400	246.1	246.3
Single & smaller	577	347	20.3	14.0
Flannel sheets	559	nr	32.2	nr
Pillowcases	13,477	14,638	248.1	263.6
Thread count:				
195 & over	723	538	25.9	19.3
180 to 194	6,500	6,855	131.4	133.6
Under 180	6,254	7,245	90.8	110.7
Fabric:				
Polyester/cotton blends	12,726	14,303	220.5	250.4
Other fabrics	751	335	27.6	13.1
Special Counts				
Branded retail shipments of sheets & pillowcases (except crib)	18,067	20,560	790.3	841.8
Upstairs brand	7,991	8,403	423.5	415.4
Open brand	10,076	12,157	366.8	426.4
Sheet sets (excluding water bed)	2,411	2,409	356.4	351.3
Waterbed sheet sets	174	129	28.8	34.9

nr not reported

Source: U.S. Bureau of the Census, Current Industrial Reports MQ23X(85)-5

As indicated in the above table, 1985 was not a good year for sheet and pillowcase mills, as a whole. Unit shipments declined almost 7% compared with 1984, and value of shipments (current dollars) went down 2.9%. One of the few bright spots was in shipments of high-count (195 and over) sheets, up 35% in quantity of shipments and 45% in value in 1985 compared with 1984, and in other than polyester/cotton blend sheets and pillowcases -- mainly all cotton. In 1985 the quantity of sheets in this classification was more than double the quantity shipped in 1984; the value of shipments was up 115%.

PRODUCT SHIPMENTS

Quantity & Value of Shipments of Terry Towels & Bath Mats By U.S. Mills: 1984, 1985

	Quantity (thous. dozens)		Value (millions of $)	
	1985	1984	1985	1984
Finished terry towels	46,129	46,735	$ 918.5	$ 944.8
Type:				
Sheared	9,708	15,613	213.6	297.7
Nonsheared	36,421	31,122	704.8	647.1
End use:				
Kitchen	6,428	7,653	42.1	56.7
Bath	21,424	20,138	528.6	559.1
Hand, guest, etc.	16,015	16,364	253.2	226.1
Bath/tub mats	656	621	23.2	24.0
Other (queen/king size, bath sheets, beach towels, bath mats)	1,606	1,959	71.3	79.0
Terry towels sold for further processing elsewhere (e.g., blanks)	6,368	6,184	72.9	95.5
Terry washcloths	22,127	22,601	130.0	123.9
Special summary date on towels:				
Branded retail shipments of towels & washcloths	32,128	31,890	535.5	533.1
Upstairs brand	7,322	6,636	187.8	161.4
Open brand	24,806	25,254	347.7	371.7
Huck & crash towels	23,691	21,498	20.5	16.4
Other terry products:				
Terry cloth sold by the yard* (yards)	13,404	15,948	26.5	29.5
Pot holders, aprons, dishcloths, etc.	6,302	4,933	26.4	33.4
Scatter rugs (tufted), bathmats, etc.	62,598**	72,454**	318.3	313.6

* To the extent that this yardage is fabricated into towels and washcloths, there is duplication in the figures.

** In thousands of square yards.

Source: U.S. Bureau of the Census, *Current Industrial Reports*, MQ23X(85)-5

Shipments of finished terry towels by U.S. mills in 1985 registered a decline of 1.3% in quantity and 2.8% in value compared with 1984. Nonsheared terry towels fared best, with quantity of shipments gaining 17%, value up 8.9%. Huck and crash towel shipments also registered a gain last year.

PRODUCT SHIPMENTS

Quantity & Value of Shipments of Sheets, Pillowcases & Terry Towels By Distribution Channel: 1985

	Total	Branded Retail*	Private Ticket Retail**	Export***	Institutional & Other‡
Sheets (except crib)					
Less than 180 count:					
Quantity	100.0%	70.5%	11.8	6.7	11.0
Value	100.0	72.1	12.4	5.5	10.0
180 count & greater					
Quantity	100.0	58.7	19.8	2.7	18.8
Value	100.0	63.7	16.5	2.8	17.0
Pillowcases					
Quantity	100.0	61.2	16.9	6.5	15.4
Value	100.0	70.0	14.7	4.5	10.8
Terry towels					
Quantity	100.0	46.8	14.5	1.4	37.3
Value	100.0	50.0	23.1	1.9	25.0
Washcloths, terry					
Quantity	100.0	47.7	12.4	1.2	38.7
Value	100.0	58.5	16.1	2.1	23.3

* Branded retail: sales of company brands including premium goods, drops (closeouts) and seconds sold to domestic consumers through all types of retailers.

** Private ticket retail: sales with retail identification -- with or without a manufacturer's corporate identification but not with a manufacturer's brand name.

*** Exports: includes only direct company shipments for export, not export shipments handled through jobbers or distributors.

‡ Institutional & other: includes domestic distribution only, and includes all Federal and State contract business, commercial accounts (hotels, etc.) which are sold on a contract basis, and shipments to dealers who are involved in resale to the institutional trade.

Source: U.S. Bureau of the Census, *Current Industrial Reports* MQ23X(85)-5

PRODUCT SHIPMENTS

Quantity & Value of Sheets & Towels By Type of Finish: 1985
(Percent distribution)

	Total	White	Solid Colors	Fancies
Sheets				
Crib				
Quantity	100.0%	39.2	5.4	55.4
Value	100.0	35.9	6.2	57.9
Other				
Quantity	100.0	15.2	23.0	61.7
Value	100.0	15.0	24.2	60.8
Terry Towels				
Quantity	100.0	28.1	46.8	25.0
Value	100.0	22.5	55.7	21.8

Source: U.S. Bureau of the Census,
Current Industrial Reports MQ23X(85)-5

Detailed information on product shipments is covered in the reports based on the 1982 census of manufactures, including home textiles and related products not covered in Current Industrial Reports. Following is information from the census on specified products compared with 1977 census results where reported.

Value of Shipments of Home Textiles & Related Products
By All U.S. Producers: 1977, 1982
(Millions of dollars)

	1982	1977
Bedspreads and bedsets	$ 402.8	$ 400.3
Made from purchased fabric	331.4	nr
Made in weaving mills	71.4	nr
Types:		
Tailored, quilted	178.5	nr
Wholly or chiefly cotton fabric	56.7	nr
Wholly or chiefly manmade fiber fabric	121.8	nr
Tailored, nonquilted	17.1	nr
Wholly or chiefly cotton fabric	9.2	nr
Wholly or chiefly manmade fiber fabric	7.9	nr
Nontailored, tufted	6.2	nr
Nontailored, not tufted	141.1	nr
Wholly or chiefly cotton fabric	55.7	nr
Wholly or chiefly manmade fiber fabric	85.4	nr
Type not specified	34.8	nr
Sheets and pillowcases	1,156.3	906.3*
Made from purchased fabric	677.6	479.5
Made in weaving mills		
Chiefly cotton	nr	nr
Chiefly manmade fiber		
100% spun	283.1	426.8
100% filament	nr	

(continued)

Value of Shipments of Home Textiles & Related Products By All U.S. Producers: 1977, 1982

(Millions of dollars)
(continued)

	1982	1977
Towels and washcloths	$ 964.0	$ 693.0
Made from purchased fabric	355.9	276.6
Made in weaving mills (chiefly cotton)	608.1	416.4
Blankets, woven	181.3	nr
Made from purchased fabric	102.7	nr
Made in weaving mills	78.6	nr
Size:		
Adult	124.2	nr
Crib	57.1	nr
Blankets, nonwoven fabrics	89.6	102.0
Curtains & draperies, except lace	1,008.3	936.7
Window curtains	289.5	233.8
Wholly or chiefly cotton	58.2	45.6
Wholly or chiefly manmade fiber fabrics	205.7	170.5
Other materials, including plastic	25.6	17.7
Draperies (all lengths)	840.6	439.6
Wholly or chiefly cotton	82.1	127.3
Wholly or chiefly manmade fiber fabrics	279.6	285.7
Other materials, including plastic	58.6	26.6
Curtains & draperies, type not specified	298.5	263.3
Shower bath curtains, including plastics, coated fabrics and all other	125.5	885.7
Quilted products, except bedspreads:		
Comforters (bed)	196.7	81.6
Convertible sleeping bags	8.5	
Mattress protectors	79.7	76.6
Other, including wadded quilts and baby pads	23.4	18.7
Tablecloths		
Plastics or plastics coated or laminated	43.8	46.6
All other	90.5	57.2
Napkins	38.8	24.5
Place mats and sets, including plastics	34.6	17.8
Other related articles except lace (dresser covers, scarfs, bridge sets, doilies, etc.)	17.5	21.3
Bed pillows:		
Foam rubber & other materials	213.5	108.7
Fancy pillows & cushions		
Foam rubber	31.6	21.5
Other materials	96.9	64.2
Slip covers		
Furniture (fabric, plastics, other)	19.7	55.5
Mattress	7.3	18.5
Other	9.7	6.8
Bags (laundry, wardrobe, shoe, storage)	30.5	21.4

(continued)

Value of Shipments of Home Textiles & Related Products By All U.S. Producers: 1977, 1982

(Millions of dollars)
(continued)

	1982	1977
Window coverings, other than curtains & draperies		
Shades & accessories	$ 181.0	$ 140.3
Plastic window shades	108.4	63.0
Other window shades	54.1	48.6
Shade accessories & rollers sold separately	9.6	18.7
Window shades & accessories, type not specified	9.0	10.0
Venetian blinds	406.5	99.0
Complete venetian blinds, vertical & horizontal		
Aluminum slat blinds	245.4	52.3
Other, wood, plastics, etc.	84.8	nr
Unassembled venetian blinds, parts, components, etc.	70.7	nr
Venetian blinds, type not specified	5.7	13.0
Other shades and blinds, curtain and drapery rods, other hardware	301.8	320.3
Shades, blinds, hardware, etc., type not specified	111.9	55.7

* Data for 1977 on sheets and pillowcases is not exactly comparable to 1982 information.

nr not reported

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Industry Series, MC82-1-23E

For certain broad product categories, the Census Bureau has compiled data on value of shipments for the year 1983, comparable to 1982 figures.

Value of Shipments By All U.S. Producers: 1982, 1983

(Millions of dollars)

	1983	1982	% Change 1983/1982
Total reported	$6,670.9	$5,978.6	+ 11.6%
Curtains and draperies, except lace	1,058.6	1,008.3	+ 5.0
Sheets and pillowcases, made from purchased fabric	775.5	677.6	+ 14.4
Towels and washcloths, made from purchased fabric	423.0	355.9	+ 18.8
Other home textiles & type not specified	2,038.2	1,934.4	+ 5.4
Drapery hardware, blinds, shades	1,187.8	1,001.2	+ 18.6
Window shades & accessories	215.6	181.0	+ 19.1
Venetian blinds	516.0	406.5	+ 26.9
Other shades, blinds; curtain & drapery hardware	353.5	301.8	+ 17.1
Shades, blinds, hardware, type not specified	102.7	111.9	- 8.2

Source: U.S. Bureau of the Census, 1983 Annual Survey of Manufactures M83(AS)-2

PRODUCT SHIPMENTS

Unit sales of conventional blankets by U.S. mills have been reported as follows:

Conventional Blankets
Domestic Mill Unit Sales, 1978-1984

Year	Millions of Units
1978	37.6
1979	36.5
1980	36.3
1981	28.8
1982	28.2
1983	26.5
1984	25.8

Source: Home Fashions Textiles (January 1986)

Concentration of Product Shipments

Share of Total Value of Shipments of Specified Products Accounted For By the Largest Companies: 1977, 1982

	Shipments (mil. $)	Percent of shipments accounted for by the largest companies:			
		Top 4	Top 8	Top 20	Top 50
Curtains & draperies, exc. lace					
1982	$1,008.3	20%	32%	45%	59%
1977	936.7	25	35	47	59
Bedspreads, bedsets made from purchased fabric					
1982	331.4	28	44	72	93
1977	300.4	29	45	71	92
Window shades & accessories					
1982	181.0	57	76	91	98
1977	140.3	72	83	91	98
Venetian blinds					
1982	406.5	62	73	84	95
1977	89.6	68	78	89	97
Other shades, blinds; rods, poles, etc.					
1982	301.8	71	85	95	99+
1977	329.7	68	78	89	97

Source: U.S. Bureau of the Census, 1982 Census of Manufactures Concentration Ratios in Manufacturing Subject Series: MC82-S-7

PRODUCT SHIPMENTS

Leading States

Share of Total Shipments of Specified Products Accounted for By Producers in Leading States, 1982

(Value in millions of dollars)

	Value	Percent
Bedspreads, bedsets made from purchased fabrics	$ 331.4	100.0%
California	32.2	9.7
Georgia	52.3	15.8
New York	78.7	23.7
North Carolina	62.8	18.9
South Carolina	31.8	9.6
Home textiles not elsewhere classified*	1,477.6	100.0
California	186.9	12.6
Georgia	95.2	6.4
Illinois	99.9	6.8
Massachusetts	39.7	2.7
New Jersey	123.4	8.4
New York	165.5	11.2
North Carolina	221.4	15.0
Ohio	55.0	3.7
Pennsylvania	68.2	4.6
South Carolina	73.9	5.0
Texas	49.1	3.3
Window shades and accessories	181.0	100.0
California	11.4	6.3
Florida	5.6	1.1
Indiana	11.2	10.9
New Jersey	7.0	3.4
New York	20.7	11.4
Venetian blinds	406.5	100.0
California	89.1	21.9
Florida	14.1	3.5
Georgia	22.2	5.5
New Jersey	58.8	14.5
Texas	40.8	10.0

* Does not include sheets, pillowcases, towels and washcloths made from purchased fabric.

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Industry Series MC82

FOREIGN TRADE

Imports

Imports of textile home goods have not registered a major impact on the U.S. market comparable to developments in apparel. The primary difference between the two segments is that unlike apparel production home textiles production is not labor-intensive. Curtains, draperies, sheets and bedspreads require less cutting and sewing -- major factors in labor costs which have fostered the tremendous jump in imports of apparel. In addition, shipping of comforters, bedspreads, pillows and other finished products is expensive due to the bulk and density of these items.

However, imports have been growing, particularly imports of all-cotton home textiles. According to the U.S. International Trade Commission, U.S. imports of bedding (i.e. sheets, pillowcases, blankets, bedspreads, comforters and quilts) totaled $166 million in 1985, representing a 45% gain over the 1984 total. A large part of the increase was in sheets and pillowcases, imports of which rose by almost 50% to $90.2 million. Imports of blankets increased by 29% to $42.5 million. Imports of bedspreads, comforters and quilts rose by 60% to $33.4 million. Increasingly tighter quotas on other textile products and the growing popularity of cotton flannel sheets contributed importantly to the growth of these imports.

During 1985, import surges prompted the United States to issue "calls" to establish quotas on cotton sheets from Brazil, China, Israel, Portugal and Taiwan, and on cotton pillowcases from China, Portugal, Taiwan, and Hong Kong.

The Census Bureau reports that imports of sheets and pillowcases accounted for 7.9% of the U.S. market in terms of value in 1985, up from 5.6% in 1984, 2.0% in 1983. In the U.S. terry towel market, imported merchandise's share was 15.4% last year, up from 14.3% in 1984, and 10% in 1983.

With consolidations completed in the past year in the home textiles industry, U.S. mills can be expected to become even more competitive with imports. Vertical weaving operations and upgraded equipment will be utilized to counter imports that offer a threat to product lines. U.S. domestics mills are now producing their own 100% cotton and polyester/cotton blend flannels to compete with the influx of imports. A weaker U.S. dollar may also help slow down the growth of imports.

Figures reported in 1985 indicated that about 5% of all curtain, drapery and matching bedcoverings fabrics are imported; and 16% of all types of towels. Most of the towel imports are for institutional use -- a market which is said to account for some 36% of all towels sold in the U.S. Imports in the curtain, drapery and bedspread area are mostly in the form of fabrics, cut and sewn. Most imports for window coverings are sheer fabrics, particularly voiles.

Brazil and China are leading sources of towel imports. Brazilian imports generally enter the retail market through American distributors, while Chinese imports are generally consigned to institutions (hotels, motels, hospitals) because of their lower price and quality. Upgraded quality and better styling is now found in Chinese products; towels from this source have been on the increase.

Flannel sheet imports, which now have competition from the U.S. product, come mainly from Belgium, Brazil, Portugal and West Germany, and also from England and Israel.

Imports of Specified Home Textiles For Consumption in the U.S., 1983-1985

	C.I.F. Value (thousands)*			% Change
	1985	1984	1982	1985/1983
Sheets, pillowcases, quilts, spreads & other home textiles n.e.c.	$576,848	$438,544	$292,200	+ 97.4%
Blankets, including electric blankets throws, etc.	40,220	30,383	14,817	+171.4

* The c.i.f. value includes the Customs valuation of the product plus all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise to the first port of arrival in the U.S.

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census: U.S. General Imports & Imports for Consumption FT135

Total Supply

Shipments, Exports, Imports & Apparent Consumption of Sheets, Pillowcases and Terry Towels, 1985

(Quantity in thousands of dozens; value in thousands of dollars)

	Sheets & Pillowcases		Terry Towels	
	Quantity	Value	Quantity	Value
Manufacturers' shipments	29,297	$1,184,751*	46,129	$ 918,457*
Exports of domestic products	633		492	
Value at port		45,365		20,650
Producers' value (estimated)**		40,987		18,658
Percent exports to mfrs. shipments	2.2%	3.5%	1.1%	2.0%
Imports for consumption	2,243	97,445***	17,461	164,005***
Apparent consumption #	30,907	1,241,209	63,098	1,063,804
Percent imports to apparent consumption	7.3%	7.9%	27.7%	15.4%

* Value f.o.b. plant.

** Value adjusted to exclude freight, insurance and other charges incurred in moving goods to port of export. This adjustment is made to connect the values to an approximation of the producers' value of exported goods.

*** Imports equal cost, insurance and freight (c.i.f.) value plus calculated import duty.

# Apparent consumption represents new domestic supply, derived by subtracting exports from the value of manufacturers' shipments plus imports.

Source: U.S. Bureau of the Census, Current Industrial Reports Sheets, Pillowcases, and Towels MQ23X(85)-5

FOREIGN TRADE

U.S. Imports & Exports of Curtains & Draperies, Textile Furnishings

	1985	1984	1983	% Change 1985/1984
Curtains & draperies				
Imports:				
Quantity (thous. lbs.)	5,202	2,528	1,841	+ 106
Value (thous. $)	$ 33,861	$ 20,867	$ 15,008	+ 62
Exports:				
Quantity (thous. lbs.)	1,895	2,003	1,592	- 5
Value (thous. $)	$ 8,818	$ 11,536	$ 13,581	- 24
Textile furnishings except floor coverings & curtains, draperies				
Imports:				
Value (thous. $)	$547,755	$416,582	$273,160	+ 31
Exports:				
Value (thous. $)	88,504	98,089	114,955	- 10

Source: U.S. International Trade Commission:
U.S. Trade Shifts in Selected Commodity Areas (Annual 1985)
USITC Publication 1864

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

Households

The household population, and particularly the formation of new households, are counts of importance in estimating the size of the markets for household products. In 1984, according to the U.S. Census Bureau, there were 86.8 million U.S. households, compared with 85.2 million in 1984, and 80.8 million in 1980.

The annual growth rate for U.S. households is expected to decline over the next 15 years. Projections just completed by the Bureau indicate a growth by the year 2000 of 18 to 27%, to between 102.4 and 110.2 million households. Between 1970 and 1985, households increased by 37%.

Household Expenditures For Home Textiles

An ongoing survey covering consumer expenditure patterns is compiled by the U.S. Bureau of Labor Statistics. Reports cover average expenditures for major product classifications by urban households (referred to as consumer units in the BLS reports), and averages are reported in terms of the "householder" -- defined as the first member of the consumer unit mentioned as an owner or renter (maintainer) of the premises at the time of the initial interview.

The averages are based on all households or consumer units, including both those purchasing the designated product and non-purchasers, and are therefore lower than the average expenditure for just those households making a purchase.

Projections of BLS survey data for 1980-1982 indicated that households with a householder (head) age 25-34 accounted for 25.5% of total purchases of home textiles (including bathroom, bedroom, kitchen, dining room and other linens, curtains and draperies, slipcovers, decorative pillows and sewing materials). The second largest share of spending was held by households with head age 35 to 44 years.

THE POTENTIAL MARKET

Household Expenditures For Home Textiles

Percent of Reported Home Textiles Expenditures by Age of Householder
1980-1981

	Total	Under 25	25-34	35-44	45-54	55-64	65 & Over
Purchases of household textiles	100.0%	5.6	25.5	21.2	17.3	18.6	11.8
For own use	100.0	5.8	26.6	22.1	17.1	16.8	11.6
For gifts	100.0	3.2	13.9	12.4	18.9	37.1	14.4

Source: Based on BLS Consumer Expenditure Survey 1980-81

Following are the average expenditures among urban households (totaling 72.5 million) in 1983, based on age of householder and household income.

Annual Expenditures For Home Textiles Among Urban Consumer Units, 1983
(Number of households in thousands)

By Age of Householder:	Under 25	25-34	35-44	45-54	55-64	65 & Over	All Consumer Units
Number of households	7,186	17,606	13,385	10,033	10,242	14,079	72,531
Average expenditure for home textiles	$ 80	$ 35	$ 72	$ 94	$ 111	$ 87	$ 75

By Income before taxes	Less than $5,000	$5,000-9,999	$10,000-14,999	$15,000-19,999	$20,000-29,999	$30,000-39,999	$40,000 & over
Number of households*	7,127	10,600	8,707	7,460	11,881	7,735	9,826
Average expenditures for home textiles	$ 23	$ 41	$ 51	$ 57	$ 76	$ 104	$ 207

* Totals 63,335,000 reporting income.

Source: Bureau of Labor Statistics,
Consumer Expenditure Survey: Interviews, 1982, 1983

RETAIL SALES BY STORE TYPE

Every five years the U.S. Department of Commerce, Bureau of the Census, conducts a complete census of business, including retail trade, in the U.S. The most recent, covering operations in 1982, showed sales of the entire domestics category (including window coverings and related hard goods products) through all types of retail outlets with one or more paid employees amounted to close to $9.0. Included in this classification were sheets, blankets, table coverings, towels, curtains and draperies, shades, venetian blinds and related merchandise. Ready-made products, as well as made-to-order merchandise and fabrics are also included in the Census Bureau sales figure. (The current value at retail is estimated at $12.0 billion.)

RETAIL SALES BY STORE TYPE

Well over half of reported sales (55.7%) were accounted for by department stores, which accounted for only 14.9% of the outlets (establishments) selling the reported types of merchandise.

Curtain, Drapery, Domestics, Window Coverings Sales By Major Retail Outlet Type: 1982

	Establishments		Sales by Outlet Type	
	Number	Percent	Thous. $	Percent
Home textiles & related merchandise				
Reported total	65,350	100.0%	$8,926,133	100.0%
Outlet Type:				
General merchandise stores, total	27,560	42.2	5,760,222	64.5
Department stores*	9,271	14.9	4,972,164	55.7
Variety stores	9,986	15.3	477,871	5.4
Misc. general mdse. stores	7,853	12.0	310,187	3.5
Furniture, homefurnishings stores, total	18,537	28.4	1,870,116	21.0
Furniture stores	8,791	13.4	238,675	2.7
Drapery, curtain, upholstery stores	4,063	6.2	723,066	8.1
Misc. homefurnishings stores	3,524	5.4	812,964	10.2
Nonstore retailers:				
Mail order houses	3,265	5.0	556,300	6.2
Direct selling establishments	966	1.5	120,270	1.3
Other retailers	15,022	23.0	619,225	6.9

* Sales from catalog order desks within the stores are included. Leased department operations, however, are not included. These are counted as separate stores in their applicable specialty. Department stores include discount department stores as well as conventional department stores, and the department store outlets of national catalog chains.

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade (RC82-1-3)

Since 1982 there have been major developments in retail distribution in all types of merchandise and particularly in home textiles. Competition has intensified with the emergence of new outlet types; aggressive price-cutting operations have come and gone.

Warehouse Clubs

Warehouse, or wholesale membership clubs, have become an increasingly important factor in the retailing of home textiles. Total volume (all merchandise) of these operators is currently pegged at about $4 billion, and this is expected to grow to $20 billion by 1990. According to Home Fashions Textiles (March 1986), home textiles account for 5%, on average of the $60-$100 million in sales that a single warehouse club generates. Average stock turns -- 15 to 18 times a year overall and 12 times a year in textiles -- are unheard of in any other retail channel. They offer competition to all levels of retailing -- from discounters to department stores, providing a growing market which upscale mills cannot ignore.

Warehouse Clubs (continued)

Although the clubs are primarily wholesalers to small business operations who pay a $25 annual membership fee, retail consumers can also join through membership in eligible organizations and by paying a 5% premium over the wholesale prices. These consumer members are said to account for about half of the warehouse clubs' volume

The breadth of the warehouse club's assortment in home textiles is limited, and likely to remain so. Nevertheless, to an increasing extent they are handling higher-priced, better quality goods and have the buying power to obtain the better brands. It is expected that they will become a growing source of competition for department stores, as well as for discounters/mass merchadisers.

Off-Price Chains

Off-price linen and domestics chains, which mushroomed three years ago, now appear to be in a shakeout period, as department stores have become more promotional and this competition is added to that faced by the chains from discounters and warehouse clubs. Price differentiation between the off-price chains and their aggressive competitors has diminished; and they can no longer rely on odd assortments, overruns, etc., sold at cut prices to hold their own in the marketplace.

Three years ago, three of the giant, publicly-owned shoe companies each took the off-price home textiles plunge. Melville Corp. acquired the 50-unit chain Linens 'n Things; U.S. Shoe expanded its nine-store Home Front, as did the Brown Group with its six-unit All-in-One chain. But early in 1986, U.S. Shoe announced plans to close a third of its 90 Home Front stores and leased departments; Melville Corp. was reported to be experiencing declines in sales at the 116-unit Linens 'n Things; and the Brown Group decided to get out of off-pricing in its newly-renamed 35-store Linen Center in favor of upgraded merchandise.

However, some of the privately-held regional off-price chains, particularly Leejay Bed and Bath, Norwood, Mass., and Stroug's Linen Warehouse, Pasadena, Calif., are reported to be profitable and expanding. Both of these, however, are in the high end of the market.

Licensing

Licensing, involving designer or character/personality names, has changed the competitive nature of domestics retailing in recent years. For department stores, a few strong designer names, such as Laura Ashley and Ralph Lauren -- which involve lines designed specifically for home textiles -- have generated increased volume, better margins, coordinated lines and exclusivity. Offering great patterns, colors and designs, rather than just a name, the successful designer lines have been coordinated in products for bedroom, bath and kitchen. Sales of Laura Ashley products are expected to hit $100 million in 1986, and have helped propel Stevens' share of the department store market from 20% to 60%.

Licensing (continued)

In contrast, department stores' reliance on apparel designer names, which were not specifically related to homefurnishings, the rapid proliferation of these names, the lack of exclusivity, and the short life of the designs have been blamed for many of the industry's problems in recent years, as stores were increasingly forced to compete on a price basis and as inventories accumulated.

Character-licensed goods were the discounters' strong seller in past years, but have now become primarily loss leaders under price competition offered by the chains. Most sellers, according to trade reports, are now forced to absorb the additional 10% to 15% royalty cost for a licensed line.

Department Stores

According to the 1982 census of retail trade, compiled by the U.S. Census Bureau, department stores accounted for almost 56% of total retail sales of home textiles that year. The market share of department stores has declined in recent years, under the strong price competition offered by discounters, mass merchandisers, off-price chains and warehouse clubs. However, they maintain the biggest share of the market for better-price, quality merchandise.

In 1982, there was a total of 9,981 department stores operating in the U.S. Of these, 9,069 reported sales of window coverings (ready-made, custom-made), slipcovers and fabrics, shades and blinds. Sales of domestics (towels, sheets, table linens, etc.) were reported by 9,688 department stores.

Department Store Sales of Home Textiles & Related Products, 1982

			Sales of specified mdse. lines % of total sales of --	
	No. of Stores	Mil. $	Stores handling line	All stores
Home textiles & related products, total	9,721	$4,972.2	5.1%	5.0%
Window treatment products, furniture covers	9,069	1,394.9	1.5	1.4
Domestics	9,688	3,577.2	3.7	3.6

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade Industry Series, RC81-1-3

Typical operating ratios in home textile and related product departments of department stores are compiled annually by the Controllers' Congress, National Retail Merchants Association. Following are typical (median) figures for 1984.

Department Stores (continued)

Merchandising & Operating Results of Specified Home Textiles In Department Stores With Sales Over $1 Million, 1984

(Median results)

	Total Upstairs Store (107)*	Domestics, Draperies & Home Goods (101)*	Custom Draperies & Slipcovers (22)	Bath Shop (31)
Net sales, % change from last year	+ 8.5	+ .9	7.2	7.0
Sales, % to total store	93.9	5.2	.5	.3
Sales, % to total division	--	100.0	9.7	6.8
Gross margin, % of sales (including cash discounts)	41.2	40.6	44.4	46.7
Markdowns, % to sales	18.8	13.0	6.6	10.2
Sales promotion, % to sales	3.1	4.6	--	4.7
Number of stock turns (times)	2.7	1.8	5.8	1.7
$ sales per sq. ft. of selling space (main or largest selling unit)	$127.0	$ 75.6	--	$57.0

	Linens & Domestics (90)*	Sheets & Pillowcases (51)*	Blankets, Comforters & Bed Pillows (52)	Table Linens & Other Table Coverings (49)
Net sales, % change from last year	+ 4.1	+ 2.7	+ 4.7	+ 3.8
Sales, % to total store	3.6	.8	.9	.8
Sales, % to total division	70.6	12.5	17.7	16.2
Gross margin, % of sales (including cash discounts)	40.1	43.5	+ 1.3	38.6
Markdowns, % to sales	13.3	14.8	13.6	13.5
Sales promotion, % to sales	4.6	4.8	6.3	4.9
Number of stock turns (times)	1.8	1.8	1.9	1.6
$ sales per sq. ft. of selling space (main or largest selling unit)	$ 83.6	$124.7	$130.6	$ 68.3

	Towels (50)	Window & Furniture Coverings (57)
Net sales, % change from last year	+ 4.1	4.8
Sales, % to total store	.9	.9
Sales, % to total division	17.5	17.8
Gross margin, % of sales (including cash discounts)	43.3	42.1
Markdowns, % to sales	12.1	12.4
Sales promotion, % to sales	3.7	4.9
Number of stock turns (times)	1.8	1.6
$ sales per sq. ft. of selling space (main or largest selling unit)	89.6	$47.8

* Number in parenthesis represents the number of stores reporting in each category.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1984

RETAIL SALES BY STORE TYPE

Drapery, Curtain & Upholstery Stores

The 1982 census of retail trade counted a total of 4,063 drapery, curtain and upholstery stores in operation that year, with total sales amounting to $858.1 million, of which 84% was in window coverings, home textiles and related products. (The balance was accounted for by sales of floor coverings and miscellaneous receipts.)

Drapery, Curtain, Upholstery Store Sales, 1982
(In stores with payroll)

	No. of Stores	Mil. $	% of Total Store Sales
Curtains, draperies, etc.	4,063	$ 723.1	84.3%
Window, furniture coverings	4,063	689.7	80.4
Domestics	643	33.3	20.8

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade
Industry Series, RC82-1-3

The off-price linens and domestics chains, previously described, were just about beginning their rapid rise (since halted) as the 1982 census got underway. According to the census counts, about 91% of the drapery, curtain specialty stores had total sales under $500,000 and these stores accounted for 63% of total sales of this outlet type. The 50 largest companies operated a total of 219 stores (5.4% of the total count) and had a 19% share of the total sales which were reported at $858 million in 1982.

RETAIL SALES BY PRODUCT

Official government figures are not compiled on retail sales by product, and trade sources must be relied on for this information. The trend in unit purchases of home textiles has been downward in recent years, but a pickup in major categories is expected in 1986 -- particularly in curtains and draperies which are expected to benefit from the rise in sales of new and replacement homes, as well as in the growth of disposable personal income.

Year-To-Year Changes in Unit Purchases by Consumers
Of Domestics, 1982-1986

	Actual		Estimated	Projected
	1982	1983	1985/1984	1986/1985
Domestics, total	- 1%	- 4%	- 1%	+ 2%
Sheets & pillowcases	+ 5	- 8	- 4	+ 1
Towels & washcloths	- 1	- 5	+ 1	+ 1
Bed coverings	- 1	- 5	- 3	+ 1
Curtains & draperies	- 7	+ 5	- 7	+ 2

Source: The KSA/NPD Purchase Panel
(Kurt Salmon Associates and The NPD Group)

RETAIL SALES BY PRODUCT

According to Home Fashions Textiles, the total retail market for home textiles and related products amounted to about $11.6 billion in 1985. Estimates on individual product classifications were reported as follows by this source:

Estimated Retail Sales of Home Textiles & Related Products, 1985
(Millions of dollars)

Total, listed classifications	$ 11,629
Bedroom:	
Sheets & pillowcases	1,557
Specialty types:	
Flannel	150 - 200
Satin	75 - 100
Waterbed	100 - 150
Bedspreads, comforters*	1,100
Daybed, Hollywood, studio covers	22
Blankets (including automatic, conventional, throw styles)	650
Conventional	378
Automatic	220
Throw	52
Bed pillows	440
Mattress pads	200
Bath:	
Towels	1,500
Bath rugs	400
Shower curtains (including curtains, hooks, liners)	250
Bath accessories	110
Tabletop:	
Table linens	375
Kitchen textiles	300
Window treatments & related products:	
Curtains	675
Draperies	850
Drapery hardware	510
Shades, blinds, etc.:	
Mini-blinds	1,300
Vertical blinds	385
Pleated shades	150
Woven wood	100
Roll-up shades	425
Slip covers & throws	120
Decorative pillows	210

* HFD (The Weekly Home Furnishings Newspaper) has estimated 1985 sales of bedspreads at $134.6 million; comforters, $677 million.

Source: Home Fashions Textiles, January 1986

RETAIL SALES BY PRODUCT

The Bridal Market

The bridal market constitutes an important share of spending for home textiles, involving both purchases of gifts and purchases to furnish new homes. An analysis of the bridal market's share of spending for linens and domestics in 1984 indicated this market accounted for about 11% of total spending in 1984.

Bridal Market Share of Total Retail Sales

	Bridal Market Sales	
	Mil. $	% of National Total
Linens & domestics		
Sheets & pillowcases	$147.0	11.4%
Pillows	37.8	14.0
Mattress pads	14.4	7.6
Blankets	47.7	15.0
Blankets, electric	13.4	3.7
Comforters, quilts	70.1	11.8
Bedspreads	40.6	9.8
Towels, washcloths	134.5	10.1
Shower curtains	18.9	11.5
Bathroom mats, rugs, ensembles	25.0	7.3
Bathroom scales	11.2	9.2
Bathroom hampers	10.5	4.6
Bathroom accessories	22.3	9.7
Table linens	74.1	21.5
Other products	10.2	--

Source: Modern Bride Magazine:
A Summary of Bridal Market Retail Expenditures (1985)

Bedroom

Unit sales of sheets have declined steadily in the last decade. Too many choices, an overabundance of designer names, a confusing list of thread counts, too many promotions have contributed to the dismal performance. However, important stores are now giving more attention to their home textiles departments. Promotions are coming under better control, with a careful selection of designer lines and special-purchase promotional merchandise.

The developing trend toward the consolidation of bedding departments in department stores, as well as the low profits in the sheet and towel area, has caused sheet mills to get into the production of bedspreads -- formerly the province of curtain and drapery manufacturers. The development of coordinated lines has been a help to bedspread business, as well as to comforter sales, bed skirts and accessory items.

While luxury and all-cotton sheets sold very well in department stores last year, discount stores edged out department stores in share of total sheet sales in 1985, according to Home Fashions Textiles. The $1.557 billion retail pie was divided as shown in the following table.

RETAIL SALES BY PRODUCT

Sheet Sales By Retail Outlet, 1985

Total sales	100%
Discount stores	33
Department stores	32
Sears, Penney, Ward	23
Specialty stores*	12

* Includes off-price specialty chains, linen specialty stores, warehouse clubs, supermarkets.

An estimate by HFD (The Weekly Homefurnishings Newspaper) placed retail sales of sheets and pillowcases at $1.625 billion in 1985. Department stores were reported to control 27% of this market; mass merchants, 36%; Sears, Penney, Ward, 18%; specialty, 6%; other, 13%.

Flannel sheets, which were almost entirely imports, are now being produced by U.S. mills and are reported to be doing well in department stores and mass merchants, according to Home Fashions Textiles. As noted on page 33, retail sales are estimated at $150-$200 million. Based on a survey of 21 top volume department stores representing 355 units, HFT found that flannel sheets now account for almost a quarter of the department stores' total sheet business. In department stores, prints account for about 62% of flannel sheet business; among mass merchants, they represent 56%. Among the 20 top volume mass merchants surveyed, while the flannel sheet business is on the rise, it accounted for only about 20% of the mass merchants' sheet business.

Growing consumer interest in natural fibers stimulated both sheet and blanket business in 1985. Luxury, high-thread count sheets did well in upscale stores. Retailers were able to improve margins somewhat, as well as to increase volume. Comforter sales maintained continued growth despite a recent comeback in bedspread business, primarily due to the growing interest on the part of customers in sheet/comforter sets and other coordinated accessories.

In addition to sheets, the share of retail sales accounted for by outlet type for other bedroom products is reported as follows:

Percent of Total Sales of Specified Products
By Retail Outlet Type, 1985

	Comforters	Blankets	Electric Blankets	Pillows	Mattress Pads	Bedspreads
Total sales	100%	100%	100%	100%	100%	100%
Department stores	29	25	12	26	25	23
Mass merchants	21	42	35	26	33	18
Sears, Penney, Ward	27	18	41	27	29	38
Specialty stores	22	10	--	14	10	20
Other	1	5	12	7	3	1

Source: HFD (The Weekly Homefurnishings Newspaper), Dec. 16, 1985

Bedroom (continued)

In the $430 million blanket classification, including conventionals, throws and thermals, Home Fashions Textiles reports that growth in demand for natural fibers has been one of the few bright spots for domestic producers, although competition from imports is stiff in the higher-end business in wool blankets and in high pile throws.

Cotton's share increased from 9.8% of total blanket business in 1980 to more than 17% in 1984 and 1985. Most of the growth is attributed to demand for all-cotton thermals. Cotton has helped retailers in some areas extend their blanket selling seasons. In the Sunbelt states, cotton thermals have become a year-round business. However, acrylics still account for the largest share of total blanket sales, followed by polyester, particularly among discounters and the major chains. The volume-oriented needlepunch blankets hold about 50% of the market; flocks, about 7%; wovens, the balance.

In a survey among 22 top-volume department stores and 21 top-volume mass merchants by Home Fashions Textiles, most reported blanket sales were up in 1985, after a bad year in 1984. Among department stores, 77% reported sales gains, with the average increase falling at 17.5%; another 23% said sales were flat; none of the respondents reported a decline. The throw category, automatics and thermals were reported to be strong performers.

HFT's breakdown on retail sales distribution in the blanket area was reported as follows: including sales of conventionals, throws, and flannels valued at $430 million, and automatic blankets, valued at $220 million.

	Conventionals, Throws, Flannels	Automatic Blankets
Total sales	100%	100%
Mass merchants	42	35
Specialty stores*	27	10
Sears, Penney, Ward	13	40
Department stores	18	15

* Includes off-price specialty retailers and linen specialty stores.

Source: Home Fashions Textiles, March 1986

Electric blankets which have been on a sales plateau appear to be headed for modest gains in units and dollars in 1986. A breakthrough technology resulting in non-thermostat blankets is expected to increase consumer interest, especially among younger affluent customers.

Comforter sales have maintained growth despite a recent comeback in bedspread sales. Growing interest in sheet/comforter sets plus coordinated accessories has helped comforter business.

RETAIL SALES BY PRODUCT

Bedroom (continued)

Mattress pads (valued at $200 million) are doing best in natural fibers, although polyester/cotton blends still account for the major share of the market. Fitted pads account for 80% to 85% of the business. Sales in total have been registering an average gain of 10% a year, according to trade sources. Wool and fleece mattress pads are new items in the market; also waterproof felt pads and undulated foam mattress pads.

In reporting on sales of bed pillows (a $440 million retail market), HFT (January 1986) found that polyester accounted for 84% of unit sales; down, 12%; foam, 4%. Total unit sales of pillows, according to HFD (The Weekly Homefurnishings Newspaper), reached 41.8 million units in 1985 compared with 40.6 million in 1984 and 41.4 million in 1983. The proliferation of shapes, including so-called "ailment pillows" for necks and backs, is a growing trend.

Bath Shop

The $2.3 billion retail market for bath shop products is dominated by discounters. According to Home Fashions Textiles these stores had 35% of the market in 1985; Sears, Ward, Penney, 25%; department stores, 24%; specialty stores, including linen specialty stores, warehouse clubs, supermarkets, 16%.

The biggest segment of sales is in towels and washcloths, valued at $1.5 billion in 1985. HFD estimates the market for shower curtains and related products at $375 million in 1985 (vs. the $250 million HFT estimate) and bath rugs, mats, etc., at $350 million (vs. $400 million).

Towel sales were reported to be in a slump in 1985, as consumers seemed to focus on bigger-ticket homefurnishings. Solid colors are the best sellers, but mills are trying to stimulate sales by developing fancy jacquard towels which are coordinated with solid-color lines.

Bath rug business has been getting a boost from the return of cotton rugs and the advent of heat-set brightly colored nylon yarns. There is also a move to more hand-crafted rugs. The 3 by 5-foot rugs from bath rug manufacturers are filling a void created by the high price of broadloom rugs of this size, and are being used throughout the home. The speed with which department stores can adapt to change is giving them an edge in sales of bath rugs.

Shower curtain business picked up after a slow start in 1985. While vinyls still represent the largest share of the market, fabric curtains are gaining in popularity, and lend themselves to designs coordinated with other bath products.

From plastics and lacquerware to ceramics and brass, bath accessories are becoming more important. Total sales in 1985 were estimated at $110 million by Home Fashions Textiles and this category is continuing to register growth due to greater emphasis on gift and impulse merchandise in the bath shop. Night-lights are an important contributor to sales in this type of merchandise.

Bath Shop (continued)

While more of the styrene plastic bath accessories sold in U.S. stores are made in this country, most ceramic and porcelain bath accessories, which represent the bulk of the business in most department stores, chains and some mass merchants, are imported. And these are getting more expensive as the U.S. dollar has weakened in relation to foreign currencies, affecting prices of imports from Japan in particular.

Distribution of Bath Accessories Retail Sales By Category, 1985

	Department Stores	Mass Merchants
Total	100%	100%
Ceramics/porcelains	28	60
Plastics	62	11
Lucite	--	11
Metal	7	10
Lacquerware	3	8

Source: Home Fashions Textiles, January 1986

An estimate by HFD, (The Weekly Home Furnishings Newspaper) (December 16, 1985) placed the value of bath accessories sales at $120 million, with sales share by outlet type reported as noted, in the following table, along with data for other bath shop products.

Percent of Specified Bath Shop Products By Retail Outlet Type, 1985

	Towels	Shower Curtains	Bath Rugs	Bath Accessories
Total sales	100%	100%	100%	100%
Mass merchants	35	58	25	14
Department stores	22	19	25	37
Sears, Penney, Ward	23	15	30	19
Specialty stores	14	6	10	17
Other	6	2	10	13

Source: HFD (The Weekly Homefurnishings Newspaper), Dec. 16, 1985

Tabletop Textiles/Kitchen Textiles

Percent of Total Sales of Tabletop Textiles/Kitchen Textiles By Retail Outlet Type, 1985

	Table Linens	Kitchen Textiles
Total sales (mil. $)	$375	$300
Percent	100%	100%
Discount stores	32	50
Department stores	33	13
Sears, Penney, Ward	25	15
Specialty stores*	10	22

* Includes off-price specialty chains, linen specialty stores, warehouse clubs, supermarkets.

Source: Home Fashions Textiles, January 1986

Tabletop Textiles/Kitchen Textiles (continued)

Sales of Tablecloths By Store Type & Cloth Type

	Department Stores	Mass Merchants
Tablecloth types:		
Solid color	41%	33%
Lace/crochet	19	6
Embroidered	11	1
Woven	11	10
Vinyl	9	40
Jacquard/damask	4	1
Print	4	5
Terry cloth	1	4

HFD reports that a shift has occurred where table linens and kitchen textiles are sold. Department stores have been losing ground to mass merchants, which, according to this source, accounted for 30% of table linen sales in 1985 (vs. 33% for department stores) and 44% of kitchen textile business (vs. 13% for department stores).

The solid-color table linen category seems to have bottomed-out in recent years, although consumer response has been good for the Visa lines, as well as for the new Du Pont Spirit of Tableaux better polyester program. Placemats account for about 25% of sales. Christmas business is reported to account for 30% of total table linen department volume.

Decorative/Utility Pillows

According to the president of Brentwood Originals, which controls about 50% of the $200-million plus decorative/utility pillow business, department stores have lost share because they have been cutting back on their curtain and drapery departments. Many mass merchants and specialty chains, on the other hand, have been emphasizing curtains, draperies and other decorative home products.

These stores have a 34% share of total retail sales of pillows, according to HFD (The Weekly Homefurnishings Newspaper). Department stores' share in 1985 was reported at 26%; Sears, Ward, Penney, 15%; specialty stores, 22%; other outlets, 3%. Total decorative pillow sales are estimated at about $160 million, while utility pillow business (including chair pads, bed rests and wedges) amounted to $40 million.

Window Treatments

The total retail market for window treatments and related products is estimated at $4.4 billion (1986). In recent years, many large department stores -- including Macy's California, Bullock's, Filene's, Robinson's, and others, went out of the ready-made curtain and drapery business. A survey by Home Fashion Textiles, reported on in the May 1986 issue, indicated that many of the major department stores still in the business are cutting back further on space devoted to curtains and draperies. However, with the surge in home sales, as well as a good economy, window treatment lines could be one of the strongest performing segments of the home textiles retail market in 1986, and many stores are going after the curtain and drapery business more aggressively. Bedspreads supplied by curtain and drapery mills are part of the stepped-up promotions and displays.

RETAIL SALES BY PRODUCT

Window Treatments (continued)

An analysis of sales distribution patterns in window treatments was reported by HFT as follows:

Percent of Total Sales of Specified Window Treatment Products By Retail Outlet Type, 1985

	Curtains	Draperies	Drapery Hardware	Mini-Blinds	Vertical Blinds	Roll-Up Shades
Total sales (mil. $)	$675	$850	$510	$1,300	$385	$425
Percent	100%	100%	100%	100%	100%	100%
Specialty stores*	4	11	25	57	68	33
Discount stores	38	15	30	14	7	28
Department stores	13	14	10	14	7	10
Sears, Penney, Ward	45	60	35	15	18	29

* Includes off-price specialty chains, linen specialty stores, warehouse clubs, supermarkets.

Source: Home Fashions Textiles, January 1986

Sales of ready-made draperies by fabric type were reported by HFT as follows:

Textures	53%
Prints	19
Antique satin	13
Jacquards	8
Sheers	7

HFT has also analyzed merchandising trends in custom and made-to-measure curtains and draperies, based on a survey of 43 top department and chain stores representing more than 750 retail outlets.

Custom curtains and draperies generally did well in 1985, according to this survey, as 62% of the retailers reported sales gains, which averaged about 16%. On the other hand, more than half the stores said 1985 sales of made-to-measure curtains and draperies were flat or down compared with 1984, with decreases averaging 24%. Of the 42% reporting sales increases, gains averaged 24% in 1985 over 1984.

Antique satin accounted for the biggest share of both custom and made-to-measure curtains and draperies last year.

Percent of Custom & Made-To-Measure Sales By Category, 1985

	Custom	Made-To-Measure
Total sales	100%	100%
Antique satin	34	42
Sheers	25	22
Prints	19	12
Textures	15	17
Casements	7	7

Source: Home Fashions Textiles, April 1986

RETAIL SALES BY PRODUCT

Window Treatments (continued)

Top treatments represent a growing part of custom and made-to-measure business, and sales have more than doubled in the last few years. On average, tops account for 27% of custom sales and over 16% of made-to-measure business.

Hard goods -- blinds of all types -- clearly dominate the window treatment market, providing ease of care, privacy, and shade as well as offering a great variety of styles. Miniblind sales have grown at the fastest rate, accounting for an estimated $1.3 billion in annual sales. Sales gains are slowing, however, as newer types -- verticals and pleated blinds, for example -- gain in popularity.

CONSUMER PRICE INDEX

Home Textiles
Annual Average Consumer Price Index, 1984-1985
(December 1977 = 100 except where noted)

	1985	1984	% Change 1985/1984
Textile housefurnishings (1967 = 100)	240.7	236.9	+ 1.6%
Curtains, drapes, slipcovers, sewing materials	159.3	155.0	+ 2.8
Household linens	141.3	140.7	+ 0.4

Source: U.S. Bureau of Labor Statistics

RETAIL ADVERTISING

Percent of Year's Retail Newspaper Advertising Linage on Home Textiles Accounted For By Each Month

	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Sheets	100.0%	10.8	5.5	7.4	7.9	7.4	10.9	9.2	6.4	6.4	7.6	8.3	12.2
Spreads	100.0	9.0	6.6	7.3	5.5	8.1	7.0	9.4	7.4	6.9	11.5	9.0	12.3
Towels	100.0	10.8	4.1	7.0	6.1	7.9	10.2	8.5	8.4	7.5	9.5	7.1	12.9

Source: Newspaper Advertising Bureau, Inc.
1986 Newspaper Advertising Planbook

CONSUMER BUYING HABITS

Percent of Year's Total Consumer Purchases Made Each Month

	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Window coverings	100.0%	7.5	7.1	11.0	11.7	7.2	8.4	8.9	6.3	7.4	7.1	9.8	7.6
Blankets, comforters	100.0	9.1	5.7	7.8	6.9	4.7	6.5	7.3	7.4	9.1	11.1	10.1	15.3
Sheets, cases	100.0	4.8	5.9	7.2	7.1	6.0	9.3	8.3	7.7	8.8	7.9	9.4	12.6
Table linens	100.0	5.9	7.3	8.4	8.5	6.9	6.1	8.1	3.7	9.3	6.1	12.3	17.5

Source: Newspaper Advertising Bureau, Inc.
1986 Newspaper Advertising Planbook

CONSUMER BUYING HABITS

Seventeen Magazine's "Back-To-School Survey," conducted in September 1984, projected purchases of home textiles by a total of 8,543,000 teenage students in high school and college represented in the study.

Purchases of Home Textiles & Related Products
By Teenage Girl Students
(Figures are in thousands)

	Number Purchasing	Number Purchased	Total Expenditures
Towels	915	4,639	$ 46,390
Sheets/pillowcases	1,142	2,628	44,795
Bedspreads	1,039	1,283	62,109
Blankets	617	970	23,141

Source: Seventeen's Back-To-School Study 1985

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now -- 1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE: Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well as information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change. For orders and further information, please write to:

FAIRCHILD FACT FILES,
Fairchild Books,
7 East 12th Street, New York, N.Y. 10003

C 3400-1.90-U A

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

Men's Sportswear, Casual Wear, Jeans

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director
Kenneth Greenman, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

TABLE OF CONTENTS

Page

MARKET TRENDS 1

AT THE MANUFACTURER LEVEL
- GENERAL INDUSTRY STATISTICS 2
  - EMPLOYMENT & EARNINGS 6
  - CONCENTRATION IN THE INDUSTRY 7
  - LOCATION OF THE INDUSTRY 9
- PRODUCTION 11
- MATERIALS CONSUMED IN PRODUCTION 14
- PRODUCT SHIPMENTS 14
- PRODUCER PRICE TRENDS 21
- FOREIGN TRADE 21

AT THE RETAIL LEVEL
- THE POTENTIAL MARKET (POPULATION) 24
  - MALE HEIGHT/WEIGHT GROUPS 26
- RETAIL SALES BY PRODUCT 27
- RETAIL SALES BY STORE TYPE 30
- RETAIL ADVERTISING PATTERN 34
- CONSUMER PRICE TRENDS 35
- CONSUMER BUYING HABITS 36

SCHEDULE OF ADDITIONAL FACT FILES 41

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright ©1986 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved.

Standard Book Number: 87005-554-2

Printed in the United States of America

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS

Market Trends

Consumer purchases of men's sportswear in 1986, overall, are expected to be relatively weak, according to an analysis by Kurt Salmon Associates. They cite the absence of a strong fashion influence for unit sales that will be flat or up only moderately. Two exceptions are expected to be in activewear and natural fiber sweaters. Retailer reports indicate that beachwear -- shorts, T-shirts and sunwear -- is doing very well. Retailers of swim and walk shorts report gains of up to 15% over last year, as basic solid colors and shorter lengths show surprising strength.

Men's sweaters, with a particular emphasis on cottons, are expected to have a good autumn in 1986. An important factor in the buying pattern for some retailers has been the devaluation of the American dollar and higher prices for foreign goods, which has made domestically-made sweaters more attractive. New colors and styling of cotton sweaters have prompted many retailers to stock up on cottons at the expense of wools. Overall, sweater prices at retail are expected to remain much the same as last year's, primarily due to some strong promotional prices on basics.

In the always competitive area of men's jeans, the current denim market was stagnant in terms of both dollars and units in 1985. According to MRCA Information Services, 1985 sales dropped 0.9% to $2.5 billion, while units fell 2.5% to 156 million. Department stores have lost market share due to the heavy price promotions offered by discounters and are relying on highly styled or treated denim to entice consumers to pay more.

Levi Strauss and Lee have both come out with new lines targeted at department and specialty stores. Levi's line, Special Reserve, is aimed at 25-35 year olds, a segment of the total consumer market that is clearly growing. Lee's Shawnee line, on the other hand, is targeted at 12-24 year olds, who have the highest per capita use of jeans in the market. As can be expected, Special Reserve is less flashy than Shawnee, with both lines scheduled to reach retailers in early summer. V.F. Corp's July acquisition of Blue Bell has created the nation's largest jeans manufacturing concern. The merged companies, which include Lee and Wrangler, control 25% of the U.S. jeans market while Levi Strauss has 22%.

Sales of novelty or contemporary woven sport shirts are expected to rise in 1986. Perhaps owing to the "Miami Vice" phenomena, growing numbers of men are livening up their wardrobes with exotic prints and solid-colored camp or pajama-collared woven shirts. Emphasis will be on unusual surface treatments like linen looks. Holiday 1986 offerings from West Coast contemporary sportswear manufacturers are filled with fancy woven shirts that have an urban western look.

Contemporary apparel, which represents an estimated 20% of total sportswear, is by now an established fashion concept with appeal to aging baby boomers -- the jeans generation that now finds itself in the 20-45 year old age group. Even establishment men's wear houses have gone after this market with updated and upscale collections. One such fashion direction is the introduction of abbreviated leisurewear lines that draw on traditional loungewear items. The new lines, in beefed-up fabrics and sportswear-inspired prints, are comfortable enough to stay around the house in, yet dressy enough for nightclubs and the supermarket. This trend was first spotted in Europe a couple of years ago when Italian men began wearing their boxer-type shorts to the beach and on the streets.

MARKET TRENDS

In activewear, department stores seek to maintain their niche through the sale of traditional brands with mass appeal, such as Jockey and Catalina. Instead of concentrating on athletic labels in direct competition with sporting goods stores, department stores are being very careful in their merchandise selections, leaving many sports-oriented manufacturers to the specialists. Some manufacturers are now taking the initiative in keeping activewear profitable in department stores by selling the idea of concept shops to the stores. Finely focused boutiques that carry a full line of active apparel for single vendors such as Reebok are springing up around the country. The Reebok plan is to open shops in one department store per market, with an emphasis on special in-store events.

This year's hot activewear category is fleecewear. It is being worn as both authentic and street activewear and this is representative of a larger trend in this area -- a narrowing of the gap between the two looks. New collections that combine the fashion savvy of street-active-looks with the comfort and function of true athletic looks, are being worn by both active purists and non-participants. A major reason this hybrid activewear gained prominence was the downturn in activewear business last year due to market saturation and price promoting by the retailers, coupled with overstocked inventories and the lack of fashion excitement by the suppliers. Such "bridge" classifications as traditional pieced, polyester/triacetate warmups with woven street-action looks are an indication that the activewear market seems to be ready for a new direction.

Private label programs continue to account for a significant portion of the men's sportswear market. The strategy for 1986 is to build upon well-established opening-priced basic assortments while adding to the share of higher-priced fashion goods. Sweaters are one of the two fastest growing private label classifications for men's wear (dress shirts being the other). Private label sweaters are 40%-60% of the mix in some stores and sell at all price points and in a wide variety of fashions. Some retailers expect the growth rate of private label sales to ease up over the next five years, citing new distribution efforts for major brands and a slowdown in the influx of imports.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

A complete census of all U.S. manufacturers is compiled every five years by the U.S. Bureau of the Census. Data included in this Fact File are from the latest census of manufactures covering plants in operation in 1982 which had one or more employees. Where available, 1982 data are supplemented by comparable findings from the 1983 and 1984 annual surveys of manufactures. The annual surveys are conducted by the Census Bureau among a sample of manufacturers to provide key measurements of manufacturing activity during intercensal periods.

Men's sportswear/casual wear is not a distinct, separately reported industry. Merchandise of this type is combined in several industry classifications under the Standard Industrial Classification system, on which the following tables are based. The sections on PRODUCTION and on PRODUCT SHIPMENTS cover available data on specific product classifications.

GENERAL INDUSTRY STATISTICS

Men's & Boys' Clothing, n.e.c. (SIC 2329*)
(Primarily Sportswear/Outerwear)

	1984	1983	1982	1977	% Change 1984/83
Number of companies	na	na	575	553	—
Number of establishments**	na	606	646	632	—
With 20 or more employees	na	366	386	400	—
Total employment (thous.)	44.9	48.2	44.6	43.8	- 6.8%
Production workers (thous.)	38.9	39.5	38.6	38.1	- 1.5
Payroll (mil. $)	$ 474.1	$ 473.6	$ 432.8	$ 285.8	+ 0.1
Value added by manufacture (mil. $)#	$1,003.5	$ 954.3	$ 931.3	$ 539.8	+ 5.2
Value of industry shipments (mil. $)##	$1,730.1	$1,595.4	$1,658.3	$1,065.1	+ 8.4
Capital expenditures, new (mil. $)	$ 22.2	$ 28.0	$ 18.3	$ 20.2	- 20.7

Knit Outerwear Mills (SIC 2253*)
(Including Men's, Women's, Children's)

	1984	1983	1982	1977	% Change 1984/83
Number of companies	na	na	893	903	—
Number of establishments**	na	852	923	953	—
With 20 or more employees	na	422	482	551	—
Total employment (thous.)	67.8	74.5	66.8	73.0	- 9.0%
Production workers (thous.)	57.2	63.4	55.9	62.7	- 9.8
Payroll (mil. $)	$ 835.0	$ 862.3	$ 741.4	$ 582.0	- 3.2
Value added by manufacture (mil. $)#	$1,906.4	$1,842.6	$1,704.8	$1,159.5	+ 3.5
Value of industry shipments (mil. $)##	$3,607.1	$3,410.0	$3,182.4	$2,335.9	+ 5.8
Capital expenditures, new (mil. $)	$ 116.6	$ 63.8	$ 53.5	$ 49.9	+ 82.8

Leather & Sheep-Lined Clothing (SIC 2386*)
(Including Men's, Women's, Children's)

	1984	1983	1982	1977	% Change 1984/83
Number of companies	na	na	186	236	—
Number of establishments**	na	175	186	239	—
With 20 or more employees	na	50	52	80	—
Total employment (thous.)	2.9	3.5	4.3	6.7	- 17.1%
Production workers (thous.)	2.4	3.0	3.6	5.9	- 20.0
Payroll (mil. $)	$ 39.0	$ 47.4	$ 48.9	$ 54.7	- 17.7
Value added by manufacture (mil. $)#	$ 84.9	$ 91.8	$ 95.7	$ 94.8	- 7.5
Value of industry shipments (mil. $)##	$ 194.4	$ 212.8	$ 221.3	$ 214.1	- 8.6
Capital expenditures, new (mil. $)	$ 1.1	$ 0.4	$ 0.9	$ 1.6	+175.0

GENERAL INDUSTRY STATISICS

Men's & Boys' Shirts & Nightwear (SIC 2321*)

	1984	1983	1982	1977	% Change 1984/83
Number of companies	na	na	535	669	—
Number of establishments**	na	708	741	928	—
With 20 or more employees	na	537	560	679	—
Total employment (thous.)	90.9	88.3	88.7	114.7	+ 2.9%
Production workers (thous.)	78.5	74.7	76.0	103.0	+ 5.1
Payroll (mil. $)	$ 905.4	$ 854.3	$ 819.0	$ 711.3	+ 6.0
Value added by manufacture (mil. $)#	$2,071.6	$1,851.0	$1,785.5	$1,445.7	+ 11.9
Value of industry shipments (mil. $)##	$3,688.8	$3,573.4	$3,477.7	$2,934.6	+ 3.2
Capital expenditures, new (mil. $)	$ 59.6	$ 38.7	$ 37.2	$ 25.9	+ 54.0

Men's & Boys' Separate Trousers (SIC 2327*)

	1984	1983	1982	1977	% Change 1984/83
Number of companies	na	na	269	404	—
Number of establishments**	na	337	356	514	—
With 20 or more employees	na	252	268	335	—
Total employment (thous.)	59.7	59.1	56.9	70.9	+ 1.0%
Production workers (thous.)	48.1	48.7	49.4	61.9	- 1.2
Payroll (mil. $)	$ 612.6	$ 615.4	$ 564.9	$ 474.0	- 0.5
Value added by manufacture (mil. $)#	$1,237.7	$1,159.5	$1,111.2	$ 845.6	+ 6.7
Value of industry shipments (mil. $)##	$2,373.2	$2,407.8	$2,165.4	$1,718.0	- 1.4
Capital expenditures, new (mil. $)	$ 30.1	$ 34.1	$ 35.7	$ 22.8	- 11.7

na not available
n.e.c. not elsewhere classified

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made, as shown below:

SIC 2329 covers manufacturers specializing in the production of men's and boys' heavy outerwear coats and jackets, swimwear and athletic shorts, ski and snow pants and other outerwear not elsewhere classified made in cut-and-sew plants.

SIC 2253 covers mills primarily engaged in knitting outerwear (men's, women's, children's) from yarn or in manufacturing outerwear from knit fabric produced in the same mill.

SIC 2386 covers manufacturers primarily engaged in manufacturing leather and sheep-lined garments for men, boys, women and children.

SIC 2321 covers establishments primarily engaged in the manufacture of men's, youths' and boys' shirts (including dress, polo and sport shirts, but not including work shirts) and nightwear cut and sewn from purchased woven or knit fabric.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

SIC 2327 covers establishments primarily engaged in the manufacture of men's, youths' and boys' separate trousers and slacks.

**Each business location is counted as a separate establishment. Data on number of establishments in 1983 are from the Census Bureau's County Business Patterns.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The value of primary products alone of these industries, plus the value of shipments by manufacturers classified in other industries (called PRODUCT SHIPMENTS), is covered on pages 15 and 16.

Source: U.S. Bureau of the Census,
1984, 1983 Annual Survey of Manufactures,
1982, 1977 Census of Manufactures

Industry Shipments

Based on data compiled by the Census Bureau, the International Trade Administration (also part of the U.S. Department of Commerce) compiles annual projections covering industry and product shipments on a current dollar and on a constant dollar basis for a limited number of apparel classifications. Projections for 1984 and 1985 compared with reported 1982 and 1983 figures are noted below.

Value of Industry Shipments, 1982-1985
(Dollar figures in millions)

					% Change	
	1985(e)	1984(e)	1983	1982	1985/84	1984/83
Industry (Men's & Boys'):						
Shirts & nightwear						
Shipments (current $)	$3,355	$3,469	$3,573	$3,478	- 3.3%	- 2.9%
Shipments (1982$)	3,153	3,270	3,494	3,478	- 3.6	- 6.4
Separate Trousers						
Shipments (current $)	$2,532	$2,545	$2,408	$2,165	- 0.5	+ 5.7
Shipments (1982$)	2,414	2,500	2,407	2,165	- 3.5	+ 3.9

(e) estimated

Source: U.S. Department of Commerce,
International Trade Administration: 1986 U.S. Industrial Outlook

GENERAL INDUSTRY STATISTICS

Employment & Earnings

According to the Bureau of Labor Statistics (U.S. Department of Labor), employment in the men's wear industry declined in 1985 from the year before. A total of 84,500 people were employed in the men's and boys' shirt industry in 1985, with 73,100 classified as production workers. These totals, however, are down 10.8% and 11.0%, respectively, from 1984 levels. Total employment in the men's and boys' trousers industry was down 9.2% in 1985, with a drop of 8.5% in the number of production workers.

The Bureau of Labor Statistics uses a different methodology in compiling data than the Census Bureau, accounting for differences in reported figures.

Employment & Earnings in Men's Sportswear/Casual Wear Manufacturing

	April Averages			Annual Averages		
	1986	1985	% Change 1986/85	1985(r)	1984(r)	% Change 1985/84
Men's & boys' shirts & nightwear (SIC 2321)						
All employees (thous.)	85.9	84.4	+ 1.8%	84.5	94.7	-10.8%
Production workers (thous.)	74.4	72.9	+ 2.1	73.1	82.1	-11.0
Average weekly earnings	$194.16	$175.74	+10.5	$182.81	$179.58	+ 1.8
Average hourly earnings	$ 5.15	$ 5.05	+ 2.0	$ 5.05	$ 4.88	+ 3.5
Average weekly hours	37.7	34.8	+ 8.3	36.2	36.8	- 1.6
Men's & boys' separate trousers (SIC 2327)						
All employees (thous.)	56.4	56.6	- 0.4	57.5	63.3	- 9.2
Production workers (thous.)	49.3	49.2	+ 0.2	50.4	55.1	- 8.5
Average weekly earnings	$188.68	$182.18	+ 3.6	$191.33	$191.66	- 0.2
Average hourly earnings	$ 5.30	$ 5.39	- 1.7	$ 5.30	$ 5.18	+ 2.3
Average weekly hours	35.6	33.8	+ 5.3	36.1	37.0	- 2.4
Knit outerwear mills (SIC 2253)						
All employees (thous.)	66.7	62.4	+ 6.9	63.6	66.3	- 4.1
Production workers (thous.)	58.5	54.2	+ 7.9	55.5	57.0	- 2.6
Average weekly earnings	$240.54	$219.24	+ 9.7	$228.46	$215.97	+ 5.8
Average hourly earnings	$ 6.33	$ 6.09	+ 3.9	$ 6.06	$ 5.79	+ 4.7
Average weekly hours	38.0	36.0	+ 5.6	37.7	37.3	+ 1.1

(r) revised

Source: U.S. Bureau of Labor Statistics, Employment and Earnings

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

As part of the complete census of manufactures covering operations in 1982, the U.S. Census Bureau has compiled data on industry concentration levels. The following tables show the extent to which the industry is dominated by large multiunit companies. This trend is in evidence most recently with the $800 million agreement by VF Corp. to acquire Blue Bell, a move that is expected to make VF -- the maker of Lee jeans -- the largest jeans manufacturer in the country.

Type of Company Ownership & Share of Shipments, 1982

	No. of Companies	Plants No.	Plants %	Employees Thous.	Employees %	Value of Industry Shipments Thous. $	Value of Industry Shipments %
Men's & boys' shirts and nightwear	535	741	100.0%	88.7	100.0%	$3,477.7	100.0%
Multiunit companies	149	355	47.9	68.8	77.6	2,897.8	83.3
Single-unit companies	386	386	52.1	19.9	22.4	579.9	16.7
Men's & boys' separate trousers	269	356	100.0	56.9	100.0	2,165.4	100.0
Multiunit companies	71	158	44.4	40.3	70.8	1,645.1	76.0
Single-unit companies	198	198	55.6	16.6	29.2	520.3	24.0
Men's & boys' clothing, n.e.c.	575	646	100.0	44.6	100.0	1,658.3	100.0
Multiunit companies	118	189	29.3	25.3	56.7	1,045.6	63.1
Single-unit companies	457	457	70.7	19.3	43.3	612.7	36.9

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Type of Organization (MC82-S-5)

Share of Value of Industry Shipments in Men's & Boys' Sportswear/Casual Wear Manufacturing, 1982

	Value of Industry Shipments (Mil. $)	Percent Accounted For By:			
		4 largest companies	8 largest companies	20 largest companies	50 largest companies
Men's & boys' clothing, n.e.c. (SIC 2329)	$1,658.3	12%	20%	38%	62%
Knit outerwear mills (SIC 2253)	3,182.4	19	29	45	64
Leather & sheep-lined clothing (SIC 2386)	221.3	32	47	69	88
Men's & boys' shirts & nightwear (SIC 2321)	3,477.7	19	29	48	69
Men's & boys' separate trousers (SIC 2327)	2,165.4	30	45	64	83

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Concentration Ratios in Manufacturing (MC82-S-7)

Concentration in the Industry (continued)

Concentration By Employment Size, 1982

	Establishments		Value Added by Manufacture*		Industry Shipments*	
	Number	%	(Mil. $)	%	(Mil. $)	%
Men's & boys' shirts and nightwear industry --	741	100.0%	$1,785.5	100.0%	$3,477.7	100.0%
By establishment (plant) size:						
Under 20 employees	182	24.6	54.0	3.0	162.8	4.7
20 - 49 employees	139	18.8	121.4	6.8	272.2	7.8
50 - 99 employees	119	16.1	196.9	11.0	409.1	11.8
100 or more employees	301	40.6	1,413.2	79.1	2,635.6	75.8
Men's & boys' separate trousers industry --	356	100.0%	$1,111.2	100.0%	$2,165.4	100.0%
By establishment (plant) size:						
Under 20 employees	88	24.7	18.1	1.6	57.9	2.7
20 - 49 employees	42	11.8	64.7	5.8	164.3	7.6
50 - 99 employees	40	11.2	49.5	4.5	110.6	5.1
100 or more employees	186	52.2	978.9	88.1	1,832.6	84.6
Knit outerwear mill industry --	923	100.0%	$1,704.8	100.0%	$3,182.4	100.0%
By establishment (plant) size:						
Under 20 employees	441	47.8	120.8	7.1	272.7	8.6
20 - 49 employees	223	24.2	143.7	8.4	273.4	8.6
50 - 99 employees	120	13.0	158.0	9.3	309.3	9.7
100 or more employees	139	15.1	1,282.3	75.2	2,327.0	73.1

* For an explanation of terms, see page 5.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures

Number of Men's & Boys' Sportswear/Casual Wear Manufacturing Establishments By Employment Size, 1983

	Men's & Boys'		
	Shirts & Nightwear (SIC 2321)	Separate Trousers (SIC 2327)	Clothing, n.e.c. (SIC 2329)
Total establishments	708	337	606
Number of employees:			
Under 10 employees	109	66	163
10-49 employees	184	46	213
50-99 employees	118	40	107
100-499 employees	280	169	117
500 or more employees	17	16	6

(continued)

Concentration in the Industry (continued)

Number of Men's & Boys' Sportswear/Casual Wear Manufacturing Establishments By Employment Size, 1983
(continued)

	Knit Outerwear Mills (SIC 2253	Leather & Sheep-Lined Clothing (SIC 2386)
Total establishments	852	175
Number of employees:		
Under 10 employees	276	98
10-49 employees	347	59
50-99 employees	112	10
100-499 employees	98	8
500 or more employees	19	--

n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census,
County Business Patterns, 1983

Location of the Industry

Industry Statistics For Leading States, 1982

	All Plants		All Employees		Value Added By Manufacture*	
	Total	With 20+ Employees	No. (thous.)	%	Mil. $	%
Men's & boys' shirts & nightwear	741	50	88.7	100.0%	$1,785.5	100.0%
Leading States						
Georgia	87	80	12.9	14.5	227.0	12.7
New York	43	40	9.1	10.3	222.1	12.4
Alabama	108	49	4.3	4.8	199.6	11.2
Pennsylvania	47	46	11.9	13.4	164.0	9.2
Tennessee	54	47	7.1	8.0	160.6	9.0
South Carolina	45	41	8.7	9.8	158.5	8.9
Men's & boys' separate trousers	356	268	56.9	100.0	1,111.2	100.0
Leading States						
Texas	24	22	9.0	15.8	201.9	18.2
Georgia	47	44	9.7	17.0	174.7	15.7
Tennessee	15	14	3.8	6.7	77.9	7.0
Mississippi	15	14	4.4	7.7	76.4	6.9
New York	57	25	1.7	3.0	69.5	6.3
Missouri	14	13	3.5	6.2	59.4	5.3
Men's & boys' clothing, n.e.c.	646	386	44.6	100.0	931.3	100.0
Leading States						
New York	102	50	4.1	9.2	107.6	11.6
California	83	31	3.1	7.0	68.0	7.3
Pennsylvania	48	33	3.8	8.5	64.0	6.9
Missouri	18	14	1.7	3.8	44.4	4.8

(continued)

GENERAL INDUSTRY STATISTICS

Location of the Industry (continued)

Industry Statistics For Leading States, 1982
(continued)

	All Plants		All Employees		Value Added By Manufacture*	
	Total	With 20+ Employees	No.(thous.)	%	Mil. $	%
Leather & sheep-lined clothing	186	52	4.3	100.0%	$ 95.7	100.0%
Leading States						
New York	73	15	1.1	25.6	24.3	25.4
California	37	6	0.6	14.0	23.0	24.0
Knit Outerwear Mills	923	482	66.8	100.0	1,704.8	100.0
Leading States						
Pennsylvania	88	63	13.2	19.8	331.4	19.4
North Carolina	51	32	11.1	16.6	325.1	19.1
New York	416	178	11.4	17.1	297.6	17.5

n.e.c. not elsewhere classified.
* For an explanation of terms, see page 5.

Source: U.S. Bureau of the Census
1982 Census of Manufactures MC82-I-22B, 23A, 23D

PRODUCTION

Among the major classifications of men's sportswear/casual wear covered in Census Bureau reports, all registered declines in production by U.S. manufacturers in 1985 compared with 1984 with the exception of jeans and dungarees. The sharpest drop was reported in sweater output (-11.5%), followed by outerwear (-10.9%), and by shorts (-10.3%).

Summary of Production of Specified Types of Men's Sportswear/Casual Wear 1984, 1985

	Production (Thous. Units)		% Change
	1985	1984(r)	1985/1984
Dress & sport trousers	116,413	122,965	- 5.3%
Jeans & dungarees	151,503	143,461	+ 5.6
Jean-cut casual slacks	34,852	36,035	- 3.3
Sport shirts, total (in thous. dozen)	32,587	33,103	- 1.6
Knit (thous. dozen)	29,203	29,565	- 1.2
Woven (thous. dozen)	3,384	3,538	- 4.4
Sweaters	2,248	2,540	-11.5
Shorts	41,900	46,723	-10.3
Outerwear jackets (except ski & not including leather)	13,716	15,396	-10.9

(r) revised

Source: U.S. Bureau of the Census
Current Industrial Reports, MA23E(85)-1

PRODUCTION

The detailed Current Industrial Reports issued by the Census Bureau on apparel production in July 1986 include information on fabric type, and construction (knit vs. woven). The figures are developed through a mail survey of all known U.S. manufacturers and jobbers with the exception of very small plants (usually less than five employees). They include garments assembled abraod and shipped back to U.S. cutters under the terms of item 807 of the Tariff Schedule.

Information on activewear covers output for men and for boys (combined). In reported categories, sweats registered strong gains in output in 1985 compared with 1984. Skiwear production by U.S. manufacturers, on the other hand, registered a sharp decline.

Production of Specified Sportswear/Casual Wear
By Fabric/Construction, 1984, 1985

	Production (Thous. Units)		% Change
	1985	1984(r)	1985/1984
Men's:			
Separate dress & sport trousers, including uniform	116,413	122,965	- 5.3%
By fabric:			
All cotton & chiefly cotton	14,839	15,900	- 6.7
Man-made fiber/wool blends (chiefly man-made)	16,288	20,961	- 22.3
All man-made & chiefly man-made	61,790	61,176	+ 1.0
All wool & chiefly wool	7,844	8,881	- 11.7
Other fabric	7,405	7,907	- 6.3
Knit fabric:			
All cotton & chiefly cotton	na	na	--
All man-made & chiefly man-made	6,722	6,832	- 1.6
Other fabric	na	na	--
Not specified	1,525	1,308	+ 16.6
Uniform trousers	5,589	5,394	+ 3.6
Jeans & dungarees	151,503	143,461	+ 5.6
All cotton & chiefly cotton	144,742	136,306	+ 6.2
All man-made & chiefly man-made	5,425	6,659	- 18.5
Not specified	1,336	496	+169.4
Jean-cut casual slacks	34,852	36,035	- 3.3
All cotton & chiefly cotton	27,040	26,058	+ 3.8
All man-made & chiefly man-made	7,456	9,693	- 23.1
Other fabric	356	284	+ 25.4
Shorts, including athletic shorts	41,900	46,723	- 10.3
By fabric:			
All cotton & chiefly cotton	21,109	20,411	+ 3.4
All man-made & chiefly man-made	15,744	13,066	+ 20.5
Other fabric	2,390	--	--
Not specified	2,657	13,246	- 79.9
By construction:			
Woven fabric	17,898	17,719	+ 1.0
Knit fabric	16,724	16,967	- 1.4
Not specified	7,278	12,037	- 39.5

(continued)

Production of Specified Sportswear/Casual Wear By Fabric/Construction, 1984, 1985
(continued)

	Production (Thous. Units) 1985	Production (Thous. Units) 1984(r)	% Change 1985/1984
	(Thousands of Dozens)		
Heavy nontailored outer jackets (except ski), including uniform	1,143	1,283	- 10.9%
By construction:			
Woven fabric	978	1,032	- 5.2
Knit fabric	55	79	- 30.4
Not specified	110	172	- 36.0
By fabric:			
All cotton & chiefly cotton	237	347	- 31.7
All man-made & chiefly man-made	623	562	+ 10.9
All wool & chiefly wool	115	79	+ 45.6
Other fabric	7	--	--
Not specified	161	295	- 45.4
Uniform jackets	171	148	+ 15.5
Light nontailored outer jackets, including uniform	1,795	1,758	+ 2.1
By construction:			
Woven fabric	947	989	- 4.2
Knit fabric	531	610	- 13.0
Not specified	317	159	- 99.4
By fabric:			
All cotton & chiefly cotton	157	150	- 4.7
All man-made & chiefly man-made	1,317	1,414	- 6.9
All wool & chiefly wool	22	23	- 4.3
Other fabric	7	7	--
Not specified	292	164	+ 78.0
Woven sport shirts	3,384	3,538	- 4.4
All cotton & chiefly cotton	1,336	1,280	+ 4.4
All man-made & chiefly man-made	1,866	1,974	- 5.5
Other fabric	71	72	- 1.4
Not specified	111	212	- 47.6
Knit sport shirts, except sweatshirts*	29,203	29,565	- 1.2
By fabric:			
All cotton & chiefly cotton	9,449	9,556	- 1.1
All man-made & chiefly man-made	17,379	17,548	- 1.0
All wool & chiefly wool Other fabric	408	470	- 13.2
Not specified	1,967	1,991	- 1.2
By type:			
Full open front shirts	392	620	- 36.8
Partial front opening (golf, polo type)	5,886	6,442	- 8.6
T-shirts made for outerwear, incl. tanktops	19,823	19,510	+ 1.6
Not specified	3,102	2,993	+ 3.6

(continued)

Production of Specified Sportswear/Casual Wear By Fabric/Construction, 1984, 1985
(continued)

	Production (Thous. Units) 1985	Production (Thous. Units) 1984(r)	% Change 1985/1984
Sweaters, including sweater vests, knit cardigans & pullovers	2,248	2,540	- 11.5%
All cotton & chiefly cotton	427	444	- 3.8
All man-made & chiefly man-made	1,184	1,211	- 2.2
All wool & chiefly wool	468	616	- 24.0
Other fiber Not specified	169	269	- 37.2
Men's & boys':			
Activewear			
Sweatshirts	7,559	6,722	+ 12.5
Sweatpants	3,027	2,496	+ 21.3
Warmup or jogging suits	1,554	1,490	+ 4.3
Swimwear	1,534	1,668	- 8.0
Woven fabric	1,247	1,248	--
Knit fabric	na	185	--
Not specified	na	235	--
Skiwear, including jackets & pants	76	94	- 19.1

*Includes turtleneck and pullover crew-neck knit shirts.
na not available
(r) revised

Source: U.S. Bureau of the Census
Current Industrial Reports,
Men's & Boys' Outerwear, MA23E(85)-1

Percent of Men's Sportswear Production by Month, 1985

	Dress & Sport Trousers	Jeans & Dungarees	Jean-cut Casual Slacks	Sport Shirts Knit	Sport Shirts Woven	Sweaters
Total production	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Percent of total done in:						
January	8.9	7.1	6.3	7.6	7.0	5.1
February	9.5	6.8	5.4	7.8	6.5	5.6
March	10.3	8.8	5.6	8.0	7.3	7.4
April	8.5	9.2	6.5	8.7	5.9	8.3
May	9.1	8.5	7.5	9.1	8.5	7.2
June	7.6	9.3	10.0	8.4	7.9	7.7
July	7.1	7.7	11.2	7.8	7.4	8.4
August	8.8	9.6	10.4	8.5	9.6	11.0
September	8.0	8.0	8.0	8.1	8.6	11.1
October	8.2	9.3	10.0	9.9	12.2	11.4
November	7.8	9.0	11.6	8.4	11.6	10.3
December	6.2	6.7	7.5	7.7	7.5	6.4

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports, MA23E(85)-1

MATERIALS CONSUMED IN PRODUCTION

The Census Bureau has reported figures on the value of materials consumed in the men's and boys' clothing, n.e.c. industry (SIC 2329), which covers manufacturers of athletic clothing including uniforms, swimwear, washable suits, skiwear, outerwear, etc., made in cut-and-sew plants, as well as the trouser/slacks industry.

Materials Consumed By Kind: 1977, 1982
(Delivered cost in millions of dollars)

	1982	1977
Men's & Boys' Clothing, n.e.c. (SIC 2329)		
Value of materials, containers, supplies	$ 601.6	$ 405.5
Broad woven fabrics	267.3	180.8
Purchased knitted fabrics	108.6	45.5
All other materials and components, parts, containers, supplies	127.4	96.0
Materials, etc. n.s.k.	98.3	83.2
Men's & boys' separate trousers (SIC 2327)		
Value of materials, containers, supplies	$ 695.2	$ 658.2
Broad woven fabrics	370.9	316.5
Purchased knitted fabrics	119.4	94.5
All other materials and components, parts, containers, supplies	126.3	111.0
Materials, etc. n.s.k.	78.6	136.2

n.e.c. not elsewhere classified
n.s.k. not specified by kind.

Source: U.S. Bureau of the Census, 1982 Census of Manufactures

PRODUCT SHIPMENTS

In contrast with "industry shipments" previously covered and defined on page 5, the value of product shipments covers the total value of shipments of specified items by all U.S. manufacturers, regardless of industry classification based on primary products.

The total value of shipments of major classifications of sportswear/casual wear covered in Census Bureau data amounted to $7.0 billion in 1985, representing a gain of 1% compared with 1984. The biggest percentage gain was noted in the value of shipments of sweat pants (including both men's and boys'), up 13% compared with 1984. Fleecewear has continued to register the strongest gains in demand.

Value of Shipments of Specified Sportswear/Casual Wear By All U.S. Manufacturers, 1984, 1985
(Millions of dollars)

	1985	1984(r)	% Change 1985/84
Total, reported products	$7,029.4	$6,954.3	+ 1.1%
Sportswear/casual wear, men's	6,190.4	6,169.1	+ 0.3
Sport shirts, total	1,553.3	1,521.8	+ 2.0
Woven	350.7	347.9	+ 0.8
Knit, except sweatshirts*	1,202.6	1,173.9	+ 2.4
Sweaters, including sweater vests, cardigans & pullovers	292.7	321.3	- 8.9
Trousers, slacks & shorts, total	3,747.5	3,726.9	+ 0.6
Separate dress & sport trousers, including uniform	1,542.2	1,562.9	- 1.3
Jeans & dungarees	1,685.2	1,605.0	+ 5.0
Jean-cut casual slacks	372.7	404.9	- 8.0
Shorts, including athletic shorts	147.4	154.1	- 4.3
Heavy nontailored outer jackets, except ski, including uniform	320.0	328.8	- 2.7
Light nontailored outer jackets, including uniform	276.9	270.3	+ 2.4
Activewear, total (men's & boys'):	839.0	785.2	+ 6.8
Sweatpants	187.5	166.0	+13.0
Sweatshirts	379.9	348.6	+ 9.0
Warmup or jogging suits	110.4	111.7	- 1.2
Swimwear	120.5	110.5	+ 9.0
Skiwear, including jackets & pants	40.7	48.4	-15.9

*Includes turtleneck and pullover crew neck knit shirts.
(r) revised

Source: U.S. Bureau of the Census
Current Industrial Reports,
Men's & Boys' Outerwear, MA23E(85)-1

Data from the census of manufactures is more detailed than the CIR reports, providing information on shipments of products not covered in the latest reports.

Quantity & Value of Shipments of Specified Men's Wear By All U.S. Producers, 1977, 1982

(Quantity in thousands of units, value in millions of dollars)

	1982		1977	
	Quantity	Value	Quantity	Value
Men's:				
Casual (nontailored) suits	79	$ 3.3	1,962	$ 52.9
Casual (nontailored) sportscoats	418	18.7	3,113	63.3
Separate vests, incl. sweater vests	1,998	23.8	nr	nr
Knit sport shirts (excl. sweatshirts)	31,010*	1,268.4	24,446*	762.8
Full open front shirts	701*	nr	nr	nr
Partial front opening (golf, polo type)	7,440*	nr	nr	nr
T-shirts made for outerwear, incl. tank tops	20,602*	nr	--	--
Type not reported	2,267*	--	--	--
Sweatshirts (incl. boys')	4,818*	269.8	3,914*	147.3
Woven sport shirts (designed primarily for sport, leisure or casual wear)	4,168*	382.1	8,983	577.5
Separate dress & sport trousers, incl. uniform	115,117	1,411.2	121,984	1,217.5
Shorts, except athletic	3,984	28.5	6,435	30.4
Jean-cut casual slacks	3,400*	464.8	nr	nr
Jeans & dungarees (excl. waistband overalls)	11,596*	1,443.4	nr	nr
Sweaters, incl. sweater vests	3,235*	361.8	3,031*	234.3
Swimwear & athletic shorts (incl. boys')	5,904*	290.7	3,224	104.1
Athletic uniforms, sold as such (incl. boys')	1,254*	76.9	nr	nr
Heavy nontailored outerjackets incl. uniform (excl. ski, leather)	1,584*	403.3	1,864*	352.5
Leather coats, jackets (incl. boys')	132*	110.1	154*	94.1
Outerwear, n.e.c. such as slack suits, ski and snow pants, etc. (incl. boys')	2,817*	338.0	4,467*	282.6

nr not reported
n.e.c. not elsewhere classified
*Quantity in thousands of dozens

Source: U.S. Bureau of the Census, 1982 Census of Manufactures MC82-1-23A, 23D

The total value of shipments of all items covered in the above table amounted to $6.9 billion in 1982 versus an estimated $4.7 billion in 1977. Included in the above table are both products made in cut-and-sew shops and products made in knitting mills.

PRODUCT SHIPMENTS

Information on the share of the total value of shipments of specified types of sportswear/casual wear which was accounted for by the largest companies has been compiled by the Census Bureau in the censuses of manufactures. Since 1982, the U.S. industry has grown smaller in terms of number of producers and the trend to concentration of shipments among the largest companies has continued.

Share of Value of Total Shipments Accounted For By Largest Companies, 1977, 1982

		Total Shipments (mil. $)	% of Total Accounted For By Largest Companies			
			Top 4	Top 8	Top 20	Top 50
Men's:						
Tailored dress & sport coats, jackets						
	1982	$ 944.0	24%	42%	73%	93%
	1977	623.0	19	33	62	85
Knit sport shirts, incl. sweatshirts (incl. boys')*						
	1982	1,112.9	23	38	62	87
	1977	809.0	25	40	64	87
Dress & sport shirts, woven (incl. boys')						
	1982	1,212.1	29	42	64	87
	1977	1,344.6	26	40	61	79
Separate dress & sport trousers (incl. boys')						
	1982	2,107.0	25	39	57	77
	1977	1,631.4	24	35	53	71
Jeans, incl. jeans-cut casual slacks (incl. boys')						
	1982	2,543.9	67	76	88	97
	1977	1,962.8	63	74	87	97
Heavy outerwear coats, jackets, non-tailored (incl. boys')						
	1982	449.8	20	35	61	88
	1977	397.3	21	34	57	83
Leather & sheep-lined clothing (men's, women's, children's)						
	1982	207.3	30	45	67	87
	1977	210.6	15	27	50	79

*Shirts made in cut-and-sew shops of knitted fabric. (Other knit shirts are made in knitting mills and comparable data is not available.)

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Concentration Ratios in Manufacturing MC82-S-7

PRODUCT SHIPMENTS

By State

For a limited number of major products the U.S. Census Bureau has included information on value of shipments by state in 1982 compared with 1977, based on the census of manufactures compiled every five years. Following is information for leading states.

Value of Shipments By All Producers in Leading States: 1977, 1982
(Millions of dollars)

	1982		1977	
Product*	Value	%	Value	%
Men's tailored dress & sport coats & jackets, total	$ 944.0	100.0	$ 623.0	100.0
States				
Georgia	77.6	8.2	27.8	4.5
Maryland	76.7	8.1	20.1	3.2
Massachusetts	122.4	13.0	63.3	10.2
New York	51.1	5.4	70.5	11.3
Ohio	77.2	8.2	27.3	4.4
Pennsylvania	216.1	22.9	179.5	28.8
Texas	124.2	13.2	15.0(e)	2.4
Other	198.7	21.0	219.5	35.2
Men's & boys' knit sport shirts, total	$1,112.9	100.0	$ 809.0	100.0
States				
Alabama	185.5	16.7	126.6	15.6
California	41.6	3.7	52.8	6.5
Georgia	88.5	8.0	15.0(e)	1.9
New York	145.3	13.1	89.8	11.1
North Carolina	178.0	16.0	75.2	9.3
Pennsylvania	43.4	3.9	80.2	9.9
South Carolina	127.6	11.5	48.1	5.9
Tennessee	84.7	7.6	58.4	7.2
Other	218.3	19.6	262.9	32.5
Men's & boys' dress & sport shirts, total	$1,212.1	100.0	$1,344.6	100.0
States				
Alabama	105.7	8.7	117.0	8.7
Georgia	183.4	15.1	137.7	10.2
New York	225.0	18.6	228.9	17.0
North Carolina	109.3	9.0	67.0	5.0
Pennsylvania	136.9	11.3	81.6	6.1
South Carolina	70.6	5.8	67.5	5.0
Tennessee	70.3	5.8	158.3	11.8
Other	310.9	25.6	486.6	36.2

(continued)

PRODUCT SHIPMENTS

By State (continued)

Value of Shipments By All Producers in Leading States: 1977, 1982
(Millions of dollars)
(continued)

Product*	1982		1977	
	Value	%	Value	%
Men's & boys' jeans, jean-cut casual slacks, total	$2,543.9	100.0	$1,962.8	100.0
States				
Alabama	84.4	3.3	61.8	3.1
California	150.1	5.9	50.0+	2.5
Georgia	219.8	8.6	181.6	9.3
Kentucky	86.9	3.4	27.4	1.4
Mississippi	138.3	5.4	130.5	6.6
New York	88.4	3.5	54.9	2.8
North Carolina	42.0	1.7	40.6	2.1
Tennessee	458.1	18.0	342.5	17.4
Texas	580.8	22.8	396.1	20.2
Virginia	105.1	4.1	124.7	6.4
Other	590.0	23.2	552.7	28.2
Men's & boys' heavy outerwear coats & jackets, total	$ 449.8	100.0	$ 397.3	100.0
States				
California	23.5	5.2	25.7	6.5
Missouri	38.0	8.4	28.3	7.1
New York	29.4	6.5	62.7	15.8
Pennsylvania	23.8	5.3	32.2	8.1
Tennessee	62.0	13.8	12.6	3.2
Washington	34.0	7.6	41.5	10.4
Other	239.1	53.2	194.3	48.9
Men's & boys' outerwear, n.e.c., total**	$ 770.8	100.0	$ 423.3	100.0
States				
Alabama	85.9	11.1	7.1	1.7
California	53.7	7.0	30.9	7.3
Georgia	61.6	8.0	17.6	4.2
Missouri	45.0	5.8	30.6	7.2
New York	112.0	14.5	63.9	15.1
Pennsylvania	54.8	7.1	24.2	5.7
Tennessee	47.2	6.1	35.3	8.3
Other	310.6	40.3	213.7	50.5

(e) estimated
n.e.c. not elsewhere classified
* Covers products made from purchased knit or woven fabrics. Does not include products made in knitting mills.
**Covers manufacturers classified in SIC2392, which includes swimwear, activewear, athletic uniforms, wash suits, and other sport/casual wear made from purchased knit or woven fabrics.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Industry Series MC82-1-23A

PRODUCT SHIPMENTS

Activewear Shipments By Leading Manufacturers

A listing of the leading active sportswear manufacturers is compiled annually by SportStyle (Fairchild Publications). The following table lists the top five companies in specified activewear categories based on 1985 sales. Figures include women's activewear as well as men's.

Leading U.S. Manufacturers of Specified Activewear, 1985
(including both men's and women's wear)
(Millions of dollars)

Tennis Apparel	1985 Sales
Jantzen	$ 30
Jockey	25
Catalina	18.5
Head sportswear	15
Fila	14.2

Golf Apparel	1985 Sales
Munsingwear	$ 31.9
La Monde du Golf	12.5
Jockey	10
Tall	8.5
Ultrasport	8.5

Active Sportswear	1985 Sales
Izod-Lacoste	$ 300
Jantzen	80
Catalina	60
Merona	55
Spalding	53

Athletic Footwear Apparel	1985 Sales
Nike	$ 172
Adidas	130
Puma	50
Pony	18
Converse	10.6

Warmups	1985 Sales
Tultex	$ 259.9
Bassett Walker	248
Pannill	191.5
Russell Knit Apparel	190
Stone Manufacturing	50

Running/Cycling/Triathalon Apparel	1985 Sales
Hind	$ 9.1
Dolfin	9.0
Sub 4	7.9
Bill Rodgers & Co.	7.4
Moss Brown & Co.	5.5

Rugged Outerwear	1985 Sales
Woolrich	$ 125
Pacific Trail	77
Patagonia	28
Jansport	20
The North Face	14

Hunting Apparel	1985 Sales
Walls	$ 18
Buddy Schoelkopf	16
Saf-T-Bak	10
Columbia Sportswear	9
Utica DuxBak	5.8

Ski Apparel	1985 Sales
CB Sports	$ 26.3
SportObermeyer	26
Roffe	21.5
White Stag	19
Head Sportswear	16

Beachwear	1985 Sales
Ocean Pacific	$ 237
Hobie Sportswear	45
Gotcha	30
Laguna	28
Catchit	13

Competitive Swimwear	1985 Sales
Speedo	$ 42
Arena	13.8
The Finals	6.5
Hind	3
Dolfin	1

Source: SportStyle
July 14, 1986

PRODUCER PRICE TRENDS

Producer (factory) prices of men's & boys' wear rose an average 1.1% in April 1986 -- the latest month for which data is available from the Bureau of Labor Statistics -- from April 1985. This annual gain is in line with the 1.2% rise in prices for all apparel products.

Among specific men's sportswear items, the largest gain in factory prices was in non-cotton and wool trousers (+3.4%). Prices for trousers made chiefly of cotton showed the largest decline (-11.4%) in April 1986 compared with a year ago.

Producer Price Index For Selected Sportswear/Casual Wear Items
(December 1981 = 100)
(unless otherwise specified)

	Monthly Averages				% Change April 1986/
	April		December		
	1986	1985	1985	1984	1985
All commodities*	297.9	309.3	310.2	309.8	- 3.7%
All apparel*	206.0	203.6	205.1	202.1	+ 1.2
Men's & boys' apparel, total*	232.4	229.9	231.2	228.8	+ 1.1
Men's trousers, except uniform					
Chiefly cotton	92.2	104.1	92.2	103.6	-11.4
Chiefly wool	107.5	105.9	107.4	104.8	+ 1.5
Other fabrics	109.9	106.3	106.6	106.9	+ 3.4
Men's denim jeans & jean-cut casual slacks	106.4	104.1	106.3	103.9	+ 2.2
Men's corduroy jeans & jean-cut casual slacks	101.9	101.9	101.9	101.5	--
Men's jeans & jean-cut casual slacks	107.0	105.7	107.4	105.7	+ 1.2

* 1967 average = 100

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

All segments of the U.S. apparel industry have been under increasingly heavy pressure from imports coming in from countries with low labor costs, or more efficient machinery and/or the advantages gained by a strong U.S. dollar which lowered the cost of imports in the U.S. Many U.S. firms have tried to counter this onslaught on their markets, both here and abroad, by foreign producers by making use of "sourcing" -- that is, using suppliers outside the firm, particularly foreign suppliers with lower costs -- to furnish some, or even all, apparel components at various stages of the manufacturing process. Some of the foreign suppliers are wholly owned by the U.S. manufacturer or are joint ventures.

Another tactic has been use of the "807" rule. This allows a U.S. apparel firm to cut fabric for the various parts of a garment, ship the parts to a foreign country for assembly, then reimport the assembled garments, paying duty only on the value added abroad. Many manufacturers in the U.S. are taking advantage of this law to cut costs and remain more competitive with direct imports.

Other recent developments include the intensification of the "Crafted With Pride in America" program, initiated by textile and apparel manufacturers to encourage U.S. consumers to buy made-in-the U.S.A. products. A "Quick Response" program is also underway in the apparel industry to improve shipping schedules and to better serve the fast-changing requirements of fashion retailers in the U.S.

Details on imports of specific products are not always included in Census Bureau published data, but are combined in broad industry or product classifications. The following summarizes general trends in major product categories, compiled by the ITA.

Value of Imports & Exports, 1982-1985
(Millions of dollars)

					% Change		
Imports	1985(e)	1984(e)	1983	1982	1985/84	1984/83	1983/82
Men's & boys'							
Suits/coats	$ 979	$ 894	$ 660	$ 613	+ 9.5	+ 35.4	+ 7.6
Shirts/nightwear	2,627	2,455	1,882	1,707	+ 7.0	+ 30.5	+10.2
Exports							
Men's & boys'							
Suits/coats	$ 17.4	$ 18.7	$ 17.2	$ 31.8	- 7.0	+ 8.7	-45.9
Shirts/nightwear	79.5	81.1	99.3	139.0	- 2.0	- 18.3	-28.6
Trousers	62.5	59.5	42.9	44.6	+ 5.0	+ 38.7	- 3.8

(e) estimated

Source: U.S. Department of Commerce, International Trade Admin.
1986 Industrial Outlook

Imports of men's sportswear and casual wear represent a large portion of total U.S. supply. However, as noted, exact measurements on the quantities of specific items are not available due to the classification of merchandise reported by the Census Bureau in the foreign trade reports.

All types of shirts, including knit and woven, dress and sport, and including both men's and boys', are reported as a single category. The total value of these imports amounted to almost $2.0 billion last year, gaining 10.3% compared with 1984. (Exports, on the other hand, amounted to only $63 million in 1985, continuing the downtrend which began in 1981 as the value of the U.S. dollar soared.) Korea, Hong Kong and Taiwan were major suppliers, accounting for 52% of U.S. imports of men's and boys' shirts in 1985.

Imports of sweaters for men and boys into the U.S. registered a gain of less than 1.0% in 1985 in terms of quantity, but gained 6.3% in terms of value compared with 1984. Imports of men's trousers, slacks and shorts rose 11.4% in 1985, to $884.4 million. Quantity was up 9.2%, to 14.5 million dozen. The value of exports in this period declined 18.6%.

Imports account for more than 60% of the domestic market for leather and sheeplined clothing, although their value in 1985 dropped almost 18% after a 40% increase in 1984. Imports of men's and boys' coats and jackets fell an estimated 14% in 1985, according to the ITA, to $193 million. Korea was the principal source, supplying over 70% of men's leather and sheeplined coats. Exports are a small factor in this industry.

U.S. Imports & Exports of Men's and Boys' Shirts and Pants, 1983-1985

	1985	1984	1983	% Change 1985/84
Men's and boys' shirts (all types)				
Imports:				
Quantity (thous. dozen)	43,314	41,896	33,482	+ 3.4%
Value (thous. $)	$1,979,359	$1,791,923	$1,288,423	+ 10.3
Exports:				
Quantity (thous. dozen)	2,374	2,376	2,815	- 0.1
Value (thous. $)	$ 62,596	$ 64,240	$ 74,416	- 2.6
Men's and boys' trousers, slacks and shorts				
Imports:				
Quantity (thous. dozen)	14,549	13,325	11,648	+ 9.2
Value (thous. $)	$884,448	$794,221	$614,209	+ 11.4
Exports:				
Quantity (thous. dozen)	2,635	2,629	1,916	+ 0.2
Value (thous. $)	$ 75,698	$ 92,988	$ 78,209	- 18.6

Source: U.S. International Trade Commission:
U.S. Trade Shifts in Selected Commodity Areas: Annual 1985
USITC Publication 1864

Quantity & Value of Imports of Specified Men's & Boys' Sportswear/Casual Wear, 1984, 1985

	Quantity (Thous. Dozen)			C.I.F. Value* (Mil. $)		
	1985	1984	% Change 1985/84	1985	1984	% Change 1985/84
Specified men's & boys' sportswear/ casual wear items, total	60,066.3	57,722.5	+ 4.1%	$3,319.8	$3,071.0	+ 8.1%
Trousers, slacks & shorts, total	12,997.2	11,996.2	+ 8.3	844.4	778.9	+ 8.4
Wool, not knit	318.5	283.8	+12.2	64.7	56.5	+14.6
Cotton, not knit	7,221.1	6,463.2	+11.7	483.4	424.8	+13.8
Man-made fibers, not knit	5,457.6	5,239.2	+ 4.2	296.2	297.6	- 0.5
Shirts, total	42,874.2	41,554.3	+ 3.2	2,089.9	1,929.3	+ 8.3
Not knit, total	25,846.1	22,155.3	+16.7	1,374.0	1,100.7	+24.8
Sport, cotton corduroy	162.0	170.1	- 4.8	11.0	10.2	+ 7.9
Sport, cotton except corduroy	8,107.4	5,686.8	+42.6	447.7	291.7	+53.4
Wool	222.5	221.3	+ 0.5	20.4	18.9	+ 7.6
Man-made fibers	14,281.8	13,280.7	+ 7.5	680.1	599.6	+13.4
Knit, total	17,028.1	19,399.0	-12.2	715.9	828.6	-13.6
Cotton	7,456.4	9,327.6	-20.1	378.3	441.9	-14.4
Wool	68.1	88.8	-23.3	9.5	10.1	- 6.6
Man-made fibers	7,747.2	8,461.2	- 8.4	307.8	354.2	-13.1

(continued)

FOREIGN TRADE

Quantity & Value of Imports of Specified Men's & Boys' Sportswear/Casual Wear, 1984, 1985
(continued)

	Quantity (Thous. Dozen)			C.I.F. Value* (Mil. $)		
	1985	1984	% Change 1985/84	1985	1984	% Change 1985/84
Sweaters, total	4,194.9	4,172.0	+ 0.5%	$ 385.4	$ 362.7	- 6.3%
Wholly or in part cashmere, knit	39.2	36.3	+ 8.0	21.0	18.0	+16.8
Sheep-like hair, except cashmere, knit	198.7	183.3	+ 8.4	24.0	21.3	+12.1
Wool	1,384.9	1,332.1	+ 4.0	158.5	149.1	+ 6.3
Cotton	323.0	309.9	+ 4.2	43.7	37.1	+17.7
Man-made fibers	2,249.1	2,310.4	- 2.7	138.3	137.2	+ 0.8

*The C.I.F. (cost, insurance, freight) value represents the value of imports at the first port of entry into the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census
U.S. General Imports FT 135
December 1984, 1985

AT THE RETAIL LEVEL

THE POTENTIAL MARKET (POPULATION)

The fastest growing segment of the male population between 1985 and 2005 will be the 35 - 54 year old age bracket. This growth, which reflects the aging of the baby boom generation, will push the number of males in this segment to 40.8 million, accounting for more than 30% of the total male population. The second fastest growing age group will be the 55 - 64 year old males, a group expected to grow almost 34% over the next 20 years. These two groups, taken together, have a great deal of discretionary income and will be in their prime earning years, a fact that augurs well for men's sportswear manufacturers.

THE POTENTIAL MARKET (POPULATION)

Estimated Male Population of the U.S., 1985, and Projections* to 1994 & 2005

	Number (Thousands)			% Change	Percent Distribution		
	1985	1994	2005	2005/1985	1985	1994	2005
Total, all ages	116,649	125,464	134,297	+15.1%	100.0%	100.0%	100.0%
Under 16 years	28,530	30,746	29,723	+ 4.2	24.5	24.5	22.1
16 years & older	88,119	94,718	104,574	+18.6	75.5	75.4	77.9
16 - 19	7,548	6,712	8,058	+ 6.8	6.5	5.3	6.0
20 - 34	31,918	29,725	27,416	-14.1	27.4	23.7	20.4
35 - 54	26,671	35,187	40,769	+52.9	22.9	28.0	30.4
55 - 64	10,500	9,793	14,060	+33.9	9.0	7.8	10.5
65 & older	11,529	13,300	14,271	+23.8	9.9	10.6	10.6
Median age (years)	30.3	33.0	36.0	--	--	--	--

*Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. (Includes Armed Forces overseas)

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census,
Current Population Reports
Series P-25, No. 952 (May 1984),
P-25, No. 985 (April 1986)

Recent studies show that exercise and health are top priorities among seniors (persons age 55 and older). The affluence and fast growth rate of this group, plus the fact that a large segment are concentrated in the Sunbelt states, where outdoor activities are year-round, has had a strong impact on the men's sports/casual wear market. More manufacturers are making a special effort to go after the mature market.

Besides the tremendous growth in interest in sports participation and fitness activities, the sportswear/casual wear market has registered growth due to the more relaxed standards of dress that prevail today, both in and out of the work place, compared with just a few years ago.

The availability of pools, both indoor and outdoor, throughout the country has made this the number one participatory sport for both men and women. A recent study by the Gallup Organization indicated that 42% of adult males had gone swimming in the 12 months before the survey. The second most popular active sport for adult males was fishing, followed by bicycling.

Male Participation in Specified Sports, 1985
(Percent of adults participating in the past 12 months)

	Percent
Swimming	42%
Fishing	41
Bicycling	29
Pool/Billiards	27
Weight training	26
Jogging	25
Softball	25
Camping	24
Bowling	23
Basketball	22

Source: Gallup Organization Inc., 1986

Male Height/Weight Groups

The following table covers 1985 estimates on the number of 18-74 year old U.S. males in specified height and weight groups. The numbers show that, even though most males are "standard" sizes, there is a large big and tall market that is expected to grow as the country gets older and heavier. Anyone whose waist measurement is within four inches of his chest or over 6 feet 3 inches in height is considered a candidate.

Manufacturers engaged in the manufacture of big and tall men's wear view the business as a viable way to boost sales and build themselves a steady, specialized business to complement their regular-sized business. The big and tall customer is just as eager as the regular-sized customer for fashion colors and styles, and usually pays about 15% more because of additional fabric and labor costs. Most manufacturers of big and tall merchandise gear their lines to big and tall specialists and men's specialty stores with developed big and tall businesses. An increasing number of them, however, are developing programs for department stores' new big and tall departments.

Distribution of the U.S. Male Population by Height/Weight Groups, 1985
(Numbers in thousands)

	Total	Under 5'6"	5'6"-5'8"	5'9"-6'1"	6'2"& Over
Total, 18-74 years	80,332	10,925	28,839	37,917	2,631
Percent	100.0%	13.6%	35.9%	47.2%	3.3%
Weight:					
Under 150 lbs.	18,075	5,463	7,391	5,061	161
Percent	22.5%	6.8%	9.2%	6.3%	0.2%
150-179 lbs.	33,579	4,017	14,219	14,942	402
Percent	41.8%	5.0%	17.7%	18.6%	0.5%
180-199 lbs.	15,825	964	4,820	9,319	723
Percent	19.7%	1.2%	6.0%	11.6%	0.9%
200-229 lbs.	9,640	402	2,008	6,427	803
Percent	12.0%	0.5%	2.5%	8.0%	1.0%
230 lbs. & over	3,213	80	402	2,169	562
Percent	4.0%	0.1%	0.5%	2.7%	0.7%

Source: Fairchild Market Research Dept. based on National Health Survey (U.S. Dept. of Health and Human Services) & U.S. Bureau of Census population projections.

RETAIL SALES BY PRODUCT

According to a market projection made at the end of 1985 by Kurt Salmon Associates, men's sportswear consumption in 1986 was expected to be relatively weak. The absence of a strong fashion influence was cited as a factor. Based on data collected by the NPD (National Panel Diary) Group, Kurt Salmon reports that two bright spots for the industry will be activewear, particularly for the beach, and natural fiber sweaters. Unit purchases of casual shirts are expected to be flat from 1985, and slacks and denim jeans purchases were expected to rise a moderate 1% and 2%, respectively.

Year-to-Year Changes in Purchases of Specified Men's Sportswear, 1982-1986
(% Change in Units)

	Projected 1986/1985	Estimated 1985/1984	Actual 1984/1983	Actual 1983/1982
Casual shirts	0	- 2.0%	-5.0%	- 4.0%
Active sportswear	+5.0%	+12.0	+6.0	+28.0
Sweaters	+3.0	+ 5.0	-4.0	+ 3.0
Slacks	+1.0	- 2.0	+4.0	- 2.0
Denim jeans	+2.0	- 5.0	-6.0	- 2.0

Source: Kurt Salmon Associates/NPD Purchase Panel, Soft Goods Outlook for 1986

The U.S. Bureau of the Census has recently released reports on retail sales of specific major merchandise categories by type of retail outlet, based on the complete census of retail trade covering operations in 1982.

The following tables cover the sales share in reported men's wear classifications held by types of retail outlets. This includes categories which were separately reported by several types of stores (not all stores selling men's wear reported details by product category). The census of retail trade, compiled every five years by the Bureau of the Census, U.S. Department of Commerce, is the only official data compiled on merchandise line sales by type of retail outlet.

Men's Shirt Sales By Major Outlet Type: 1982
(In retail establishments with payroll)

	Establishments Number	Establishments Percent	Sales By Outlet Type Thous.$	Sales By Outlet Type Percent
Shirts, knit & woven, dress & sport, reported total	40,821	100.0	$4,445,861	100.0
Department stores	8,328	20.4	2,127,968	47.9
Men's wear stores	15,299	37.5	1,181,587	26.6
Women's ready-to-wear stores	1,956	4.8	84,624	1.9
Family clothing stores	15,238	37.3	1,051,682	23.7

RETAIL SALES BY PRODUCT

Men's Pants Sales By Major Outlet Type: 1982
(In retail establishments with payroll)

	Establishments		Sales By Outlet Type	
	Number	Percent	Thous.$	Percent
Tailored & dress slacks, casual slacks, jeans, walking shorts, reported total	39,843	100.0	$4,747,285	100.0
Department stores	8,419	21.1	1,751,702	36.9
Men's wear stores	15,038	37.7	1,417,266	29.9
Women's ready-to-wear stores	1,524	3.8	73,210	1.5
Women's accessory & specialty stores and furriers	53	0.1	1,180	#
Family clothing stores	14,809	37.2	1,503,927	31.7

Less than 0.1%

Men's Sweater Sales By Major Outlet Type: 1982
(In retail establishments with payroll)

	Establishments		Sales By Outlet Type	
	Number	Percent	Thous.$	Percent
Sweaters, reported total	29,000	100.0	$1,148,813	100.0
Department stores	5,796	20.0	552,451	48.1
Men's wear stores	12,711	43.8	332,810	29.0
Women's ready-to-wear stores	986	3.4	23,471	2.0
Family clothing stores	9,507	32.8	240,081	20.9

Men's Activewear Sales By Major Outlet Type: 1982
(In retail establishments with payroll)

	Establishments		Sales By Outlet Type	
	Number	Percent	Thous.$	Percent
Activewear, reported total*	33,318	100.0	$1,831,869	100.0
Department stores	6,931	20.8	796,943	43.5
Men's wear stores	7,923	23.8	174,505	9.5
Women's ready-to-wear stores	690	2.1	29,546	1.6
Family clothing stores	8,713	26.2	287,178	15.7
Sporting Goods stores#	9,061	27.2	543,697	29.7
General line	6,568	19.7	408,849	22.3
Specialty line	2,493	7.5	134,848	7.4

*Not including footwear
#Includes both men's and boys' activewear

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade

RETAIL SALES BY PRODUCT

Additional data on men's wear sales by type of outlet is reported by MRCA Information Services in Apparel Merchandising (May and June 1986). According to this source, unit sales of men's jeans dropped from about 160 million in 1984 to 156 million in 1985, a 2.5% decline. In terms of dollar volume, the classification fell 0.9% to about $2.5 billion. Discount operations improved their market share significantly for the year by relying heavily on price promotions to generate volume. They gained business at the expense of chains, specialty stores and department stores to account for 28% of unit volume and 23% of dollar volume.

Retail sales of woven sport shirts totaled nearly $1.8 billion in 1985, up 13.2% for the year, according to MRCA. Mass merchandisers accounted for 28% of sales, picking up market share from specialty stores.

Retail Sales of Men's Jeans By Outlet Type, 1984 and 1985

	Dollar Volume		Unit Volume	
	1985	1984	1985	1984
Chains	25%	26%	24%	27%
Discount stores	23	19	28	22
Specialty stores	20	23	19	20
Department stores	16	16	14	15
Variety stores	2	2	2	2
All others	14	14	13	14

Source: MRCA Information Services, Stamford, Conn.
(Apparel Merchandising, June 1986)

Retail Sales of Woven Shirts By Outlet Type, 1984 and 1985
(Share of Dollar Volume)

	1985	1984
Mass merchandisers	28%	25%
Discount/Off-price stores	21	21
Department stores	20	20
Specialty stores	15	19
Variety stores	2	2
Other	14	13

Source: MRCA Information Services, Stamford, Conn.
(Apparel Merchandising, May 1986)

The preceding table, which shows a growing share of woven sport shirt sales by mass merchandisers, corresponds to a growth in total sales of this merchandise. 1985 sales of woven sport shirts were nearly $1.8 billion, up 13.2% for the year. Knit shirt sales, on the other hand, declined 13.8%. A major reason for this was the 16% increase in woven shirt imports in 1985, which represented 61% of all shirt imports.

RETAIL SALES BY PRODUCT

Retail Sales of Men's Tops, 1983-1985
(Millions of dollars)

	1985	1984	1983	% Change 1985/84
Total tops	$8,073	$7,940	$7,514	+ 1.7%
Knits	2,006	2,328	2,208	-13.8
Dress shirts	2,234	2,058	1,948	+ 8.6
Woven sport shirts	1,779	1,572	1,546	+13.2
Sweaters	1,755	1,652	1,503	+ 6.2
Work shirts	299	330	310	- 9.4

Source: MRCA Information Services, Stamford, Conn.
(Apparel Merchandising, May 1986)

RETAIL SALES BY STORE TYPE

Activewear

Retail sales of apparel classified as "activewear" for men totaled an estimated $2.2 billion in 1985, according to industry analysts. The latest available government data on retail sales of men's activewear, from the census of retail trade, reports sales amounting to $1.8 billion in 1982 (as noted on page 28). Department stores had the largest share of the market with 43.5% of total sales. Sporting goods stores trailed with 29.7%.

Department stores, after a major effort at luring active sports participants away from sporting goods stores with authentic brands like Adidas, Nike and Puma, reversed course a bit in the first half of 1986 by concentrating instead on more traditional labels like Jantzen, Catalina, Jockey and Robert Bruce. Many stores are increasing their private label business in an effort to offer more unique fashion items. Presently among the major activewear styles are warmups, knit shirts and pull-on pants.

Activewear collections that play off of sports themes such as baseball and football, yet combine new fashion ideas like geometric prints, reflect the intent of many manufacturers to incorporate ideas from both authentic and street active looks. This year's hot activewear category -- fleecewear -- is being used for both types of activewear, with industry-wide sales up 15%-30% over last year, according to major manufacturers.

Activewear sales estimates for 1984-1986 have been compiled by the National Sporting Goods Association, through a nationally-representative survey of 80,000 households. It does not include institutional purchases and certain product categories.

RETAIL SALES BY STORE TYPE

Activewear

Estimated Retail Sales of Men's Activewear, 1984-1985
(Millions of dollars)

	Forecast 1986	Estimated 1985	Estimated 1984	% Change 1986/1985
Swimwear	$145.9	$141.7	$143.7	+ 3.0%
Golf clothing	168.8	163.8	165.3	+ 3.1
Parkas - down/fiber-filled	134.0	131.2	131.2	+ 2.1
Shorts - elastic waist	126.4	126.5	126.5	--
Skiwear	188.3	172.5	162.7	+ 9.2
Sweatshirts	170.8	162.6	154.9	+ 5.0
Tennis clothing	87.2	82.5	80.9	+ 5.7
Vests - down/fiber-filled	106.6	106.5	112.1	--
Warmup suits	279.2	279.3	346.5	--

Source: Fairchild Market Research Department based on National Sporting Goods Association *The Sporting Goods Market in 1986*

Specialty Stores

Sales of men's wear in specialty stores -- men's wear stores and family clothing stores -- is covered in the 1982 census of retail trade. Men's wear stores accounted for $6.7 billion worth of men's wear sales, 31.6% of the total (second to department stores with 45.1%). Family clothing stores -- stores primarily selling apparel for men, women and children without specializing in any one line -- accounted for $4.6 billion worth of men's wear sales (21.5%).

Sales of Specified Men's Wear in Specialty Stores, 1982

	Establishments		Sales
MEN'S WEAR STORES	Number	Percent	(Thous. $)
Reported total	17,480	100.0	$7,734,522
Men's wear, total	17,480	100.0	6,741,742
Shirts, knit and woven, dress and sport	15,299	87.5	1,181,587
Tailored and dress slacks, casual slacks, jeans, walking shorts	15,038	86.0	1,417,266
Sweaters	12,711	72.7	332,810
Activewear	7,923	45.3	174,505
FAMILY CLOTHING STORES			
Reported total	17,859	100.0	13,451,003
Men's wear, total	17,859	100.0	4,583,566
Shirts, knit and woven, dress and sport	15,238	85.3	1,051,682
Tailored and dress slacks, casual slacks, jeans, walking shorts	14,809	82.9	1,503,927
Sweaters	9,507	53.2	240,081
Activewear	8,713	48.8	287,178

Note: Each store location is separately counted as an "establishment."

Source: U.S. Bureau of the Census, *1982 Census of Retail Trade*

RETAIL SALES BY STORE TYPE

Department Stores

Data on merchandise line sales in department stores has been made available in recently issued reports covering the complete 1982 census of retail trade. Included in the totals, in addition to traditional department stores, are discount department stores and the department store operations of national chains such as Sears and Montgomery Ward.

Men's wear sales were reported by 9,947 department stores in 1982, 99.7% of all department stores. Sales of this merchandise amounted to $9.6 billion, which was 9.7% of all department store sales that year. The following table shows sales of specific men's wear classifications in department stores.

Sales of Specified Men's Wear in Department Stores, 1982

	Establishments		Sales
	Number	Percent	(Thous. $)
Department stores, total	9,981	100.0	$99,170,163
Men's wear, total	9,947	99.7	9,606,115
Shirts, knit and woven, dress and sport	8,328	83.4	2,127,968
Tailored and dress slacks, casual slacks, jeans, walking shorts	8,419	84.4	1,751,702
Sweaters	5,796	58.1	552,451
Activewear	6,931	69.4	796,943

Note: Each store location is separately counted as an "establishment."

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade

In the typical department store with a total volume over $1 million, sales of casual wear jackets & slacks accounted for 25.2% of total male apparel sales, according to the National Retail Merchants Association. Their 1985 report on operating results shows that sport shirts represented 11% of the total male apparel sales, while sweaters/vests and active sportswear were 6.1% and 7.1%, respectively. Active sportswear departments had sales per square foot of $235.80.

RETAIL SALES BY STORE TYPE

Department Stores

Merchandising & Operating Results of Men's Sportswear Departments In Department Stores With Sales Over $1 Million

(Median results)

	Adult Male Apparel (104)*	Casual Wear Jackets & Slacks (55)*	Sport Shirts (31)*	Sweaters & Vests (25)*	Active Sportswear (45)*
Net sales, % change from last year	+ 9.0%	+ 10.5%	+ 10.4%	+14.3%	+ 13.1%
Sales, % to total store	13.1	3.6	1.5	1.0	1.0
Net sales, % of adult male apparel	100.0	25.2	11.0	6.1	7.1
$ sales per sq. ft. of selling space (main or largest unit)	$167.2	$185.2	$171.1	na	$235.8
Cumulative markon, %	51.0	49.5	52.2	52.3	50.5
Gross margin, % of net sales (incl. cash discounts)	41.9	38.4	44.1	43.9	40.9
Markdowns, retail, % of sales	19.6	23.6	21.7	27.8	22.9
Number of stock turns (times)	2.7	2.7	3.5	3.9	3.1
Sales promotions, % of net sales	2.9	3.9	4.5	na	4.0

*Number in parenthesis refers to the number of reporting companies.
na not available.

Source: National Retail Merchants Association
Merchandising & Operating Results of 1985
(1984 edition)

Sporting Goods Stores

Sporting goods stores, which have always held a major share of apparel sales for active sports participants, have been broadening their apparel stocks to include the active looks sought by non-participants (street activewear). Warmups, at various price points and in various fabrications, continue to be a big seller. Many sporting goods stores report that apparel sales represent a growing share of their sales, at the expense of declining equipment sales.

According to the 1982 census of retail trade, released by the government in late 1985, there were 20,152 sporting goods stores with payroll in operation anytime during the year. This figure includes 9,252 general line sporting goods stores (45.9%) and 10,900 specialty line sporting goods stores (54.1%). These two types are defined as follows:

General line sporting goods stores: stores primarily selling a general line of sporting goods and equipment for hunting, camping, fishing, tennis, golf, etc. Also gym and fitness equipment.

Specialty line sporting goods stores: stores specializing in a maximum of four lines of sporting goods and equipment, such as bicycles, skiing equipment, golf equipment, etc.

RETAIL SALES BY STORE TYPE

Sporting Goods Stores

Sporting Goods Store Sales By Merchandise Line, 1982
(Includes establishments with payroll, including leased departments)

	Stores		Sales of specified merchandise lines		
				Percent of total sales of—	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
General line sporting goods stores sales, total	9,252	100.0	$4,377,471	—	100.0
Activewear, except footwear	6,568	71.0	691,363	—	15.8
Men's & boys'	6,568	71.0	408,849	12.9	9.3
Women's & girls'	6,236	67.4	282,514	9.2	6.5
Specialty line sporting goods stores, total	10,900	100.0	3,137,440	—	100.0
Activewear, except footwear	2,493	22.9	245,786	—	7.8
Men's & boys'	2,593	22.9	134,848	15.9	4.3
Women's & girls'	2,177	22.0	110,938	15.0	3.5

Source: U.S. Bureau of the Census
1982 Census of Retail Trade RC82-1-3

RETAIL ADVERTISING PATTERN

Percent of Newspaper Ad Linage Done By Retailers Each Month

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Slacks	3.6%	6.2	8.2	8.1	6.8	12.2	7.5	11.9	8.1	7.9	9.1	10.4
Sportswear/ Accessories	4.2%	4.6	6.7	6.5	7.3	13.4	6.5	8.5	6.1	7.8	11.8	16.6

Source: Advertising Checking Bureau, 1984

CONSUMER PRICE TRENDS

While the consumer price index for men's wear rose 3.0% in 1985, the CPI for coats and jackets fell 0.2%. Prices of shirts and pants (dungarees, jeans and trousers) rose at a higher level than the average for all men's wear -- up 3.8% and 3.4%, respectively.

The latest monthly averages released by the Bureau of Labor Statistics are for April 1986 and they show a definite moderating in consumer prices for men's wear. The CPI for all men's apparel was up just 1.0% from April 1985, while the averages for shirts and pants declined for the year.

CONSUMER PRICE TRENDS

Consumer Price Index of Specified Men's Sportswear Items
(December 1977=100, unless otherwise specified)

	April Averages			Annual Averages		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/84
All items (1967=100)	325.3	320.1	+ 1.6%	322.2	311.1	+ 3.6%
Apparel commodities less footwear (1967=100)	188.4	188.2	+ 0.1	188.1	183.2	+ 2.7
Men's apparel	126.0	124.7	+ 1.0	124.7	121.1	+ 3.0
Coats & jackets	100.4	100.4	--	101.4	101.2	+ 0.2
Shirts	132.2	132.5	- 0.2	132.2	127.4	+ 3.8
Dungarees, jeans & trousers	117.3	119.1	- 1.5	117.5	113.6	+ 3.4

Source: U.S. Bureau of Labor Statistics

CONSUMER BUYING HABITS

The following table, using data collected by MRCA Information Services, is an approximation of men's wear purchases by month. It shows, for example, that in January an average of 96 pairs of jeans were purchased per 1,000 households. Multiplying the purchase rate shown for a particular category each month by the number of households in a given area yields an estimate of the quantity actually purchased. These numbers reflect the large volume of men's wear purchases that can be expected in the summer months and at Christmastime.

Average Purchase Rate (in Units) Per 1,000 Households

	Avg. Month	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Shirts/Sweaters	660.5	410.7	399.8	502.2	416.4	470.9	817.5	583.1	595.9	533.7	608.7	776.9	1,810.8
Pants/Slacks/Shorts	227.1	131.6	122.8	200.2	211.4	261.9	433.5	248.4	236.1	201.1	137.4	181.1	359.9
Jeans	154.8	96.1	101.5	142.8	127.7	101.7	150.9	145.0	220.1	171.3	120.6	155.7	324.7
Swimwear/Sweats	73.0	43.1	50.5	63.4	34.4	54.7	91.6	56.8	43.5	60.4	61.9	119.1	196.9

Source: Newspaper Advertising Bureau,
1986 Newspaper Advertising Planbook

Percent of Men's Sportswear Purchases By Price

	Under $10	$10-19.99	$20-29.99	$30-39.99	$40-49.99	$50 & Over
Light jackets	12.6%	32.0	24.6	14.8	5.1	10.9
Slacks	11.3%	51.6	28.1	5.8	1.7	1.5
Jeans	12.6%	74.6	11.0	1.7	0.1	—
Sweaters	22.2%	49.3	18.3	6.9	2.0	1.2
Sport shirts	58.5%	34.7	5.7	0.9	0.1	—
Swimsuits	63.4%	30.6	5.9	1.1	—	—
Warmups	6.3%	34.6	31.1	13.5	9.2	5.3

Source: Newspaper Advertising Bureau,
1986 Newspaper Advertising Planbook

The buying habits of 25-35 year old males was explored in a Gallup survey undertaken for Apparel Merchandising (October 1985). Results show that 45% of these baby boomers spent between $100 and $299 on sportswear in 1985. More than half reported that they purchased sportswear in department stores, with men's specialty stores frequented by 21%. Purchasers of active sportswear frequent sporting goods stores most (42%), followed by department stores.

Percent of Annual Men's Sportswear Expenditures By Price, 1985
(Males 25-35 Years Old)

Amount Spent During Year	All Sportswear	Active Sportswear
Less than $100	17%	38%
$100 - $199	23	33
$200 - $299	22	14
$300 - $399	11	6
$400 - $499	5	4
$500 - $999	11	--
$1,000 - $1,999	4	--
$2,000 - $2,999	--	--
$3,000 or more	--	--
Don't know	7	5

Source: The Gallup Organization,
(Apparel Merchandising, October 1985)

Purchases of Men's Sportswear By Store Type By Males 25-35 Years Old, 1985

	All Sportswear			Active Sportswear		
		Annual Income			Annual Income	
	Total	Under $30,000	Over $30,000	Total	Under $30,000	Over $30,000
Department stores	51%	50%	54%	36%	35%	38%
Men's specialty stores	21	16	28	8	7	9
Mass merchandisers	12	17	7	6	9	4
Discount stores	10	14	4	8	13	4
Sporting goods stores	9	8	11	42	35	47
Off-price/factory outlets	2	2	2	2	--	3
Catalog/mail order	1	--	2	1	2	--
Other	2	2	2	2	3	2
Don't know	3	2	3	3	3	3

Note: Percentages add to more than 100% due to multiple responses.

Source: The Gallup Organization,
(Apparel Merchandising, October 1985)

Jeans

According to a study done on the men's jeans market by The Gallup Organization (Apparel Merchandising, February 1986), about two-thirds of the adult males surveyed plan on buying denim jeans in 1986. These men prefer basic straight-leg/five-pocket jeans over other styles by a wide margin, regardless of age and geographic location. 46% expect to pay up to $19.99 for a pair, with 67% of the men reporting that they usually buy at sale price. By fabric choice, 67% plan to purchase all-cotton, 15% a polyester/cotton blend and 10% stretch denim. Unwashed and prewashed rank equally as the denim finish of choice.

Expected Purchase Price For Men's Jeans, 1986

		Age Group					Income		
	Total	18-24	25-34	35-49	50-64	65 & Over	Under $15,000	$15,000 $30,000	Over $30,000
Under $15	11%	4%	8%	12%	22%	17%	6%	11%	11%
$15-$19.99	35	44	37	32	24	46	47	40	30
$20-$24.99	23	26	25	23	18	13	24	20	25
$25-$29.99	15	17	17	14	13	—	9	15	17
$30-$34.99	6	1	5	9	5	13	—	6	8
$35-$39.99	3	4	3	3	4	—	1	2	6
$40.00-$59.99	1	3	1	1	—	—	—	2	1
Don't know	6	1	4	6	14	11	13	4	2

Source: The Gallup Organization,
(Apparel Merchandising, February 1986)

CONSUMER BUYING HABITS

Jeans

Anticipated Purchases of Men's Jeans By Age of Male Purchaser, 1986

		Age of Male Purchaser				
Number of Pairs	Total	18-24	25-34	35-49	50-64	65 & Over
None	34%	16%	11%	31%	50%	76%
One	12	6	17	16	11	1
Two	19	25	22	22	13	12
Three	10	15	13	12	5	5
Four	7	10	9	5	11	--
Five	4	11	4	3	1	--
Six	4	5	7	2	2	--
Seven or more	5	9	9	4	3	--
Don't know	5	3	8	5	4	6

Note: Percentages add to more than 100% due to multiple answers.

Source: The Gallup Organization,
(Apparel Merchandising, February 1986)

Brand Preferences in the Purchase of Men's Jeans By Age and Region, 1986

		Age Group					Region			
	Total	18-24	25-34	35-49	50-64	65 & Over	East	Midwest	South	West
Levi's	49%	79%	51%	42%	30%	25%	44%	44%	49%	61%
Lee	18	18	22	17	8	25	29	25	13	4
Wrangler	13	10	14	22	3	13	17	12	14	9
Calvin Klein	6	4	7	6	5	4	5	6	9	3
Jordache	5	6	4	4	5	—	7	5	9	3
Private label	3	—	5	3	4	4	2	4	—	7
Other	6	6	7	7	—	8	7	6	4	2
No preference	24	6	18	29	47	21	24	24	28	19
Don't know	5	—	8	6	5	13	7	7	3	6

Note: Percentages add to more than 100% due to multiple answers.

Source: The Gallup Organization,
(Apparel Merchandising, February 1986)

Type of Denim Finish Preferred For Men's Jeans, 1986

		Age Group					Region			
	Total	18-24	25-34	35-49	50-64	65 & Over	East	Midwest	South	West
Unwashed/rigid	47%	43%	55%	41%	46%	33%	40%	45%	43%	59%
Prewashed	46	52	38	50	52	46	50	50	49	34
Stonewashed	6	10	12	—	1	—	9	2	6	7
Don't know	5	1	4	7	3	21	7	9	2	5

Note: Percentages add to more than 100% due to multiple answers.

Source: The Gallup Organization,
(Apparel Merchandising, February 1986)

Type of Fabric Preferred For Men's Jeans, 1986

	Age Group					
	Total	18-24	25-34	35-49	50-64	65 & Over
All-cotton denim	67%	71%	77%	63%	53%	58%
Polyester/cotton blend	15	15	9	18	20	25
Stretch denim	10	5	9	13	15	4
Does not look at fabric content	6	12	5	2	9	4
Don't know	6	5	7	6	4	13

Note: Percentages add to more than 100% due to multiple answers.

Source: The Gallup Organization,
(Apparel Merchandising, February 1986)

Sweaters

Sweaters are clearly one of the growth areas of men's sportswear. According to MRCA, sales reached $1.8 billion in 1985, a gain of more than 6% for the year. Data on buying habits of men's sweaters was covered in a Gallup Organization study (Apparel Merchandising, March 1984). It showed a wide consumer preference for purchasing sweaters in department stores, where the proliferation of private label brands may account for more than half of the mix in some stores.

Men's Sweater Purchases By Age of Purchaser
(Most recent purchase)

	18-24	25-34	35-44	45 & over
Department store	39%	42%	37%	40%
Specialty store	19	15	10	8
J.C. Penney	6	3	10	6
Discount store	4	5	9	5
Sears	5	4	7	4
Off-price/factory outlet	2	2	--	1
Mail order/catalog	--	1	1	--
Other	12	4	5	4
Don't know	13	24	21	32

Source: The Gallup Organization

Men's Sweater Purchases -- Sale Price Vs. Regular Price
(Most recent purchase)

		Age Group				Household Income			
	Total	18-24	25-34	35-44	45 & Over	Under $10,000	$10,000 $14,999	$15,000 $24,000	$25,000 & Over
Bought on sale	29%	30%	33%	36%	23%	20%	26%	32%	33%
Bought at regular price	37	48	42	35	32	27	31	43	39
Don't know	34	22	25	30	44	52	44	25	28

Source: The Gallup Organization

Price Paid for Most Recent Men's Sweater Purchase

		Age Group				Household Income			
	Total	18-24	25-34	35-44	45 & Over	Under $10,000	$10,000 $14,999	$15,000 $24,999	$25,000 & Over
Less than $20	22%	21%	24%	24%	22%	19%	21%	30%	20%
$20 - $29	26	33	26	31	20	14	19	26	29
$30 - $49	13	17	17	14	10	7	9	13	18
$50 or more	4	6	6	3	4	2	2	4	8
Don't know	35	23	27	28	44	58	49	27	25

Source: The Gallup Organization

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now -- 1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE: Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well as information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change. For orders and further information, please write to:

FAIRCHILD FACT FILES,
Fairchild Books,
7 East 12th Street, New York, N.Y. 10003

C3400 1.91-U A

FAIRCHILD

FACT FILE

Market Research Division
Fairchild Publications, New York

Sportswear, Casual Wear, Separates, Jeans (Women's, Misses' & Juniors')

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst

Distributed through
Book Division
Fairchild Publications
Division of Capital Cities Media, Inc.
New York

TABLE OF CONTENTS

Page

MARKET TRENDS.......... 1

AT THE MANUFACTURER LEVEL:

GENERAL INDUSTRY STATISTICS.......... 2
  EMPLOYMENT & EARNINGS.......... 4
  INDUSTRY CONCENTRATION.......... 6
  PLANT CAPACITY UTILIZATION.......... 9
  LOCATION OF THE INDUSTRY.......... 9

PRODUCTION.......... 10
MATERIALS CONSUMED IN PRODUCTION.......... 17
PRODUCT SHIPMENTS.......... 18
PRODUCER PRICE TRENDS.......... 25
FOREIGN TRADE.......... 26

AT THE RETAIL LEVEL:

THE POTENTIAL MARKET (POPULATION).......... 29
RETAIL SALES BY OUTLET TYPE.......... 30
RETAIL SALES BY PRODUCT.......... 36
RETAIL ADVERTISING PATTERN.......... 38
CONSUMER PRICE TRENDS.......... 39
CONSUMER BUYING HABITS.......... 39

SCHEDULE OF ADDITIONAL FACT FILES.......... 46

Fairchild Fact Files, prepared by the Fairchild Market Research Division and distributed through Fairchild Books, are published for the sole purpose of providing information for customers of Fairchild Books and are in no way intended to represent, promote or injure any business entity. To provide this service to our customers, the most reliable government, marketing and publications sources are used in these reports. In some instances, details will not add to the totals shown because of rounding.

E. B. Gold, Manager
Fairchild Book Division

Copyright ©1986 by Fairchild Publications
Division of Capital Cities Media, Inc.

All Rights Reserved

Standard Book Number: 87005-555-0

Printed in the United States of America

WOMEN'S, MISSES', JUNIORS' SPORTSWEAR/CASUAL WEAR

MARKET TRENDS

Overall performance at the retail level in women's sportswear/casual wear has generally been flat in recent months, and the outlook for 1986 is for only a moderate gain compared to 1985. However, this category includes a great variety of merchandise, some of which are registering big gains, including sweaters and activewear.

Kurt Salmon Associates, a New York-based management consulting firm has reported that consumer purchases of sweaters increased 11% in 1985; activewear registered gains of 16% and 15%, respectively. For 1986 Kurt Salmon estimates a gain of 10% in unit purchases of women's sweaters and an 8% gain in activewear.

Sweater fashion developments such as silhouette, color and stitch have been important factors in the growth of this market. They are versatile and enable women to update their wardrobes economically. They lend themselves to "impulse" buying and multiple purchases.

As the popularity of sweaters enters its third year, retailers are stepping up efforts to benefit. Private label programs have been increased, and it is estimated that about 25% of all sweater sales are now in private label merchandise. This share is growing among the large merchandisers, and as a result, many sweater resources are looking to specialty store distribution to maintain profit margins.

Fleecewear items have been doing well -- both in active "sweats" and, more recently, in updated street or fashion activewear. The fleece category is expected to continue growing through 1987 as more suppliers come into the market with the new fashion looks and strong colors.

Some lines of women's sportswear are very successful, such as Liz Claiborne. However, as noted in sweaters, the highly competitive nature of the market, the discounting of branded lines and the widening availability of lines in competitive outlets, has led many large retailers to develop private label programs in a variety of sportswear items. These are either sourced abroad because of price and/or styling advantages, or obtained through branded resources in the U.S.

New looks in denim are expected to stimulate consumer interest in sportswear/casual wear and to result in gains in moderate-priced (main floor) and upstairs departments. Trendy designs are expected to perform well in contemporary departments aimed at relatively young, fashion-conscious customers. In activewear, growth is expected in fashion active that can be used for street or leisure wear, as well as for active sports. Another strong area is aerobic wear.

A number of U.S. large manufacturers are also large importers. Liz Claiborne, for example, imported 84% of its total supply in 1985; Reebok, which recently established a new division to produce active lifestyle apparel, will produce all of the line overseas. For its part, the U.S. industry is stepping up efforts to become more competitive with foreign suppliers.

Included in these efforts is the use of foreign plants to assemble finished garments which are cut in U.S. plants. When the assembled garments are returned to the U.S., duty need be paid only on the value added overseas, under the 807 rule in the Tariff code.

A public relations campaign aimed at making U.S. consumers look for the "Made in the U.S.A." label is well underway, and manufacturers have also stepped up efforts to speed up deliveries to retailers -- a key element in the fast-changing, multi-product sportswear/casual wear field. Branded manufacturers are also working directly with large retailers to supply U.S.-made private labels as well as their branded lines.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

A measure of trends in the women's, misses' & juniors' blouse segment of sportswear/casual wear is developed in the annual report, U.S. Industrial Outlook, compiled by the International Trade Administration.

The value of industry shipments of women's blouses and shirts decreased 10% in real value in 1985, compared with a 12% drop in 1984. On a current dollar basis, the decline in 1985 was estimated at 4.4%.

Women's, Misses' & Juniors' Blouse Industry Trends 1982-1985
(Value in millions of dollars)

					% Change		
	1985(e)	1984	1983	1982	1985/84	1984/83	1983/82
Value of U.S. industry shipments:							
Current $	$3,291	$3,442	$3,804	$3,896	- 4.4%	- 9.5%	- 2.4%
Constant (1982) $	2,874	3,193	3,628	3,896	-10.0	-12.0	- 6.9

(e) estimated

Source: U.S. Department of Commerce,
International Trade Administration
1986 U.S. Industrial Outlook

A complete census of all manufacturers in the U.S. which have one or more paid employees is compiled every five years by the U.S. Bureau of the Census. Results from the latest, covering operations in industries primarily involved in the production of women's sportswear, casual wear and jeans in 1982 are covered below. In addition, comparable figures are reported from the 1983 annual survey of manufactures. The Census Bureau conducts annual surveys using a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity in intercensal periods.

Sportswear/casual wear is not a clearly defined industry classification, but is included in a number of industry classifications under the Standard Industrial Classification system. In some cases, such as Knit Outerwear Mills, industry data covers manufacturers of apparel for men and women, as well as children.

In 1983 compared with 1982, the value added by manufacture in knit outerwear mills increased 8.1%. Value added within the women's, misses' and juniors' outerwear industry increased 4.6%; in the blouse industry, value added within the industry registered a decline of 3.8% in 1983.

GENERAL INDUSTRY STATISTICS

Women's, Misses' & Juniors' Blouse Industry (SIC 2331*)

	1984	1983	1982	1977	% Change 1984/1982
Number of companies	na	na	1,825	1,297	—
Number of establishments, total**	na	1,711	1,955	1,422	- 12.5%**
With 20 or more employees	na	994	1,111	959	- 10.5**
Employees, total (thous.)	91.5	93.1	92.3	83.8	- 0.9
Production workers (thous.)	76.5	79.3	79.4	74.2	- 3.6
Payroll (mil. $)	$ 897.4	$ 921.2	$ 876.1	$ 572.2	+ 2.4
Value added by manufacture, (mil. $)#	1,738.3	1,774.2	1,843.6	1,198.6	- 5.7
Value of industry shipments, (mil. $)##	3,579.3	3,804.1	3,896.2	2,344.2	- 8.1
Capital expenditures, new (mil. $)	72.5	40.2	29.4	24.3	+146.6

Women's, Misses' & Juniors' Outerwear, n.e.c. (SIC 2339*)

	1984	1983	1982	1977	% Change 1984/1982
Number of companies	na	na	1,595	1,634	—
Number of establishments, total**	na	1,549	1,746	1,802	- 11.3%**
With 20 or more employees	na	969	1,039	1,072	- 6.7**
Employees, total (thous.)	108.3	108.2	110.9	104.4	- 2.3
Production workers (thous.)	92.1	90.8	93.5	88.3	+ 1.5
Payroll (mil. $)	$1,151.1	$1,109.9	$1,099.0	$ 735.3	+ 4.7
Value added by manufacture, (mil. $)#	2,597.6	2,365.7	2,261.2	1,579.5	+ 14.9
Value of industry shipments, (mil. $)##	5,239.0	4,847.5	4,833.9	3,294.7	+ 8.4
Capital expenditures, new (mil. $)	50.2	51.9	85.4	42.4	- 41.2

Knit Outerwear Mills (SIC 2253*)

	1984	1983	1982	1977	% Change 1984/1982
Number of companies	na	na	893	903	—
Number of establishments, total**	na	852	923	953	- 7.7%**
With 20 or more employees	na	422	482	551	- 12.4**
Employees, total (thous.)	67.8	74.5	66.8	73.0	+ 1.5
Production workers (thous.)	57.2	63.4	55.9	62.7	+ 2.3
Payroll (mil. $)	$ 835.0	$ 862.3	$ 741.4	$ 582.0	+ 12.6
Value added by manufacture, (mil. $)#	1,906.4	1,842.6	1,704.8	1,159.5	+ 11.8
Value of industry shipments, (mil. $)##	3,607.1	3,410.0	3,182.4	2,335.9	+ 13.3
Capital expenditures, new (mil. $)	116.6	63.8	53.5	49.9	+117.9

na not available
n.e.c. not elsewhere classified

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as defined below:

SIC 2331 comprises establishments primarily engaged in the manufacturing of women's, misses' and juniors' blouses, waists and shirts.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

SIC 2339 includes manufacturing establishments primarily engaged in the manufacture of women's, misses' and juniors' outerwear, not elsewhere classified, such as neckwear, swimwear, slacks, ski suits, sweaters, and outerwear sport shirts, cut and sewn from purchased woven or knit fabric; also washable service apparel.

SIC 2253 includes establishments making knit outerwear for men and boys, as well as women and children. Separate industry figures are not available, as most mills produce for men, women and children.

NOTE: Industry data on manufacturers of women's skirts, pants, pantsuits and jackets is combined in SIC 2337 with data on manufacturers of women's coats and suits. The SIC is covered in the Women's Coats and Suits Fact File.

** Covers manufacturing establishments only, and each location is separately counted. Not included are separate auxilary locations serving the plants (i.e. administrative offices, purchasing offices, sales promotion offices, etc.). Data on number of establishments in 1983 are from the Census Bureau's County Business Patterns.

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

## Value of industry shipments includes, along with receipts for contract work, all items made for or by each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in these industries. The value of primary product shipments, alone, plus the value of these shipments by manufacturers classified in other industries, is covered in the section on PRODUCT SHIPMENTS.

** Covers 1983/1982.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
1983 Annual Survey of Manufactures

Employment & Earnings

The apparel industry is labor-intensive, and manufacturing costs in the U.S. are very high compared with major apparel shippers abroad, particularly Taiwan, Hong Kong and Korea, as well as emerging suppliers to the U.S. market. In reaction to the sharp growth in apparel imports, U.S. manufacturers have consolidated operations in the U.S., streamlined and improved their production and marketing procedures in order to cut costs. In addition, deliveries have been sped up to get a competitive edge over imports.

GENERAL INDUSTRY STATISTICS

Employment & Earnings (continued)

U.S. firms are also making use of "sourcing" -- that is, engaging suppliers outside the firm to furnish some or all components at various stages of the manufacturing process, and these suppliers are foreign producers, as well as domestic producers. Esprit, for example, which is a major U.S. firm in the sportswear/casual wear category, produces about 95% of its apparel in Asia. Reebok, the footwear company which is now becoming a strong force in activewear, produces its products overseas. A major U.S. producer, Liz Claiborne, Inc., sources internationally (accounting for 84% of its total units in 1985); 25% of Kayser Roth apparel is imported.

Some manufacturers are taking advantage of the "807" law, by which a U.S. apparel firm is allowed to cut fabric for the various parts of a garment, ship the parts to a foreign country for assembly, then import the finished garment, paying duty on the value added to the cut pieces. In addition, some large U.S. apparel firms have wholly-owned or jointly-owned overseas plants.

All of these developments, plus a decline in the export market, have led to a sharp cutback in employment in the U.S. apparel industry. From an average of 64,000 in 1979, employment in the women's blouse industry declined steadily, reaching an average of 53,300 in 1985. In the women's outerwear, n.e.c. industry, employment in the same period dropped from a high of 149,400 in 1979 to 140,600 in 1985. In knit outerwear mills -- with a large share of output concentrated in women's sportswear/casual wear -- employment averaged 78,600 in 1978. By 1985, the level had dropped to 63,600. As noted in the following table, the downward trend in the number employed in key sportswear/casual wear industries has continued in 1986.

Employment & Earnings in Selected Women's Sportswear & Separates Industries

	April Average			Annual Average		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/84
Women's, misses' & juniors' blouses (SIC 2331*):						
All employees (thous.)	51.7	52.9	- 2.3%	53.3	58.6	- 9.0%
Production workers (thous.)	43.0	44.2	- 2.7	44.6	49.9	- 10.6
Average weekly earnings	$175.44	$172.89	+ 1.5	$178.52	$175.08	+ 2.0
Average hourly earnings	5.10	5.10	—	5.13	5.06	+ 1.4
Average weekly hours	34.4	33.9	+ 1.5	34.8	34.6	+ 0.6
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339*):						
All employees (thous.)	170.9	172.9	- 1.2	169.1	160.3	+ 5.5
Production workers (thous.)	143.8	144.7	- 0.6	140.6	134.5	+ 4.5
Average weekly earnings	$188.51	$189.56	- 0.6	$191.17	$186.71	+ 2.7
Average hourly earnings	5.31	5.37	- 1.1	5.34	5.23	+ 2.1
Average weekly hours	35.5	35.3	+ 0.6	35.8	35.7	+ 0.3
Knit outwear mills (SIC 2253*):						
All employees (thous.)	66.7	62.4	- 6.9	63.6	66.3	- 4.1
Production workers (thous.)	58.5	54.2	- 7.9	43.0	45.5	- 5.5
Average weekly earnings	$240.54	$219.24	+ 9.7	$228.46	$215.97	+ 5.8
Average hourly earnings	6.33	6.09	+ 3.9	6.06	5.79	+ 4.7
Average weekly hours	38.0	36.0	+ 5.6	37.7	37.3	+ 1.1

See page 4 for definition of SIC codes.
n.e.c. not elsewhere classified.

Source: U.S. Bureau of Labor Statistics

GENERAL INDUSTRY STATISTICS

Industry Concentration

As in most other industries in the U.S., mergers and acquisitions are becoming commonplace among firms making sportswear/casual wear. Most recently, VF Corporation, manufacturer of Lee jeans, agreed to buy Blue Bell, the maker of Wrangler jeans, for about $800 million. This sale is expected to make VF the leading jeans manufacturer, controlling 25% of the market, including both men's and women's. Levi Strauss, the current leader, presently has about 22% market share. When the purchase is completed. VF will own, in addition to the Lee Brand, Wrangler, Rustler and Girbaud jeans. They will also acquire Jantzen sportswear, Red Kap work clothes and Jansport outdoors wear.

As part of the complete census of manufactures covering operations in 1982, the U.S. Census Bureau has compiled data on industry concentration levels. Competitive pressure, mergers and acquisitions have resulted in fewer companies and greater concentration of industry activity since 1982.

Single & Multiunit Companies' Share of Shipments, 1982

		Plants		Employees		Value of Industry Shipments	
	Companies	No.	%	Thous.	%	Thous. $	%
Women's & misses' blouses	1,824	1,954	100.0%	92.2	100.0%	$3,884.2	100.0%
Multiunit companies	140	270	13.8	30.0	32.5	1,653.7	42.6
Single unit companies	1,684	1,684	86.2	62.2	67.5	2,230.5	57.4
Women's, misses' outerwear, n.e.c.	1,592	1,745	100.0	110.7	100.0	$4,830.4	100.0
Multiunit companies	185	338	19.4	54.6	49.3	2,607.0	54.0
Single unit companies	1,407	1,407	80.6	56.0	50.7	2,223.4	46.0
Knit outerwear mills	896	923	100.0	66.8	100.0	$3,182.4	100.0
Multiunit companies	106	133	14.4	38.1	57.0	2,095.9	65.9
Single unit companies	790	790	85.5	28.7	43.0	1,086.4	34.1

n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Type of Organization, Subject Series MC82-S-5

GENERAL INDUSTRY STATISTICS

Industry Concentration (continued)

Share of Value of Industry Shipments Accounted For By the Largest Companies

		Value of Industry Shipments*				
Industry	No. of Companies	Total (mil. $)	Percent accounted for by largest companies: 4 largest	8 largest	20 largest	50 largest
Women's & misses' blouses:						
1982	1,824	$3,884.2	8%	14%	27%	44%
1977	1,292	2,333.6	12	18	30	47
1972	890	1,254.9	18	26	38	55
Women's & misses outerwear n.e.c.:						
1982	1,592	4,830.4	23	22	34	49
1977	1,625	3,285.1	14	20	33	50
1972	1,247	1,638.0	18	25	37	52
Knit outerwear mills:						
1982	896	3,182.4	19	29	45	64
1977	903	2,335.8	17	27	46	63
1972	882	1,703.8	16	26	44	59

n.e.c. not elsewhere classified
*For an explanation of terms see page 4.

Source: U.S. Bureau of the Census
1982 Census of Manufactures
Concentration Ratios in Manufacturing (MC82-S-7)

Smaller manufacturing plants, based on number of employees, account for a larger share of shipments of blouses than noted for the two other industry segments covered in Census Bureau data. Plants with 100 or more employees in the blouse industry (12.6% of the total) accounted for just over 40% of the value of industry shipments in 1982. Comparable figures in the outerwear n.e.c. industry were 17.1%/58.8%; and in knit outerwear, 15.1%/73.1%.

Concentration by Employment Size, 1982

	Establishments		Value Added By Manufacture*		Industry Shipments*	
	Number	%	(Mil. $)	%	(Mil. $)	%
Women's & misses blouse industry--	1,955	100.0%	$1,843.6	100.0%	$3,896.2	100.0%
By establishment (plant) size:						
Under 20 employees	844	43.2	196.8	10.7	496.5	12.1
20 - 49 employees	508	26.0	360.1	19.5	855.1	21.9
50 - 99 employees	357	18.3	462.7	25.1	971.7	24.9
100 or more employees	246	12.6	823.9	44.7	1,572.8	40.4

(continued)

Industry Concentration (continued)

Concentration by Employment Size, 1982
(continued)

	Establishments		Value Added By Manufacture*		Industry Shipments*	
	Number	%	(Mil. $)	%	(Mil. $)	%
Women's & misses outerwear n.e.c. industry--	1,746	100.0	2,261.2	100.0	4,833.9	100.0
By establishment (plant) size:						
Under 20 employees	707	40.5	138.8	6.1	361.5	7.7
20 - 49 employees	461	26.4	318.2	14.1	751.3	15.5
50 - 99 employees	280	16.0	418.5	18.5	879.2	18.2
100 or more employees	298	17.1	1,385.7	61.3	2,841.9	58.8
Knit outerwear mill industry--	923	100.0	1,704.8	100.0	3,182.4	100.0
By establishment (plant) size:						
Under 20 employees	441	47.8	120.8	7.1	272.7	8.6
20 - 49 employees	223	24.2	143.7	8.4	273.4	8.6
50 - 99 employees	120	13.0	158.0	9.3	309.3	9.7
100 or more employees	139	15.1	1,282.3	75.2	2,327.0	73.1

n.e.c. not elsewhere classified
*For an explanation of terms, see page 4.

Source: U.S. Bureau of the Census
1982 Census of Manufactures

Number of Women's Sportswear & Casual Wear Manufacturing Establishments By Employment Size, 1983

	Women's, Misses' & Juniors:		
	Blouses (SIC 2331)	Outerwear n.e.c. (SIC 2339)	Knit Outwear Mills (SIC 2253)
Total establishments	1,711	1,549	852
Number of employees:			
Under 10 employees	438	361	276
10 - 49 employees	734	411	347
50 - 99 employees	312	275	112
100 - 499 employees	218	265	98
500 or more employees	9	18	19

n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census
County Business Patterns, 1983

GENERAL INDUSTRY STATISTICS

Plant Capacity Utilization

For the fourth quarter of 1984, knit outerwear mills in the U.S. operated at 73% of the industry's preferred rate, compared with an operating rate of 76% of the preferred level in the fourth quarter of 1983. (The preferred level is defined as a level, normally between actual operations and practical capacity, which the manufacturer would prefer not to exceed due to costs or other considerations). The following figures represent the ratio of actual utilization to the preferred level of operations.

Capacity Utilization Rates: Fourth Quarters 1981 - 1984

	1984	1983	1982	1981
Women's, misses' & juniors blouses	nr	93	83	92
Women's, misses' & juniors' outerwear, n.e.c.	nr	92	84	92
Knit outerwear mills	73	76	88	80

nr not reported
n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census
Current Industrial Reports:
Survey of Plant Capacity, 1984 MC-C1(84)1

Location of the Industry

The following table, based on the 1982 census of manufactures, covers the states which lead in the value added by manufacture in plants classified in industries related to women's sportswear/casual wear.

Industry Statistics For Leading States, 1982

	All Plants		Employees		Value Added By Manufacture	
Industry	Total	With 20+ Employees	No. (thous.)	%	Mil. $	%
Women's, misses' & juniors' blouses, U.S. total	1,955	1,111	92.3	100.0%	$1,843.6	100.0%
Leading states:						
California	504	210	14.8	16.0	414.4	22.5
New York	444	196	11.4	12.4	405.3	22.0
Pennsylvania	292	242	19.0	20.6	248.6	13.5
North Carolina	73	55	6.3	6.8	104.2	5.7
New Jersey	122	54	4.0	4.3	96.7	5.2

(continued)

Location of the Industry (continued)

Industry Statistics For Leading States, 1982
(continued)

Industry	All Plants Total	All Plants With 20+ Employees	Employees No. (thous.)	Employees %	Value Added By Manufacture Mil. $	Value Added By Manufacture %
Women's, misses' & juniors' outerwear, n.e.c., U.S. total	1,746	1,039	110.9	100.0%	$2,261.2	100.0%
Leading states:						
New York	459	241	15.9	14.3	584.4	25.8
California	372	188	15.8	14.2	366.4	16.2
Texas	70	46	9.3	8.4	184.8	8.2
Pennsylvania	122	93	9.1	8.2	123.4	5.5
Georgia	56	41	4.8	4.3	108.9	4.8
Knit outerwear mills						
U.S. total	923	482	66.8	100.0	$1,704.8	100.0
Leading states:						
Pennsylvania	88	63	13.2	19.8	331.4	19.4
North Carolina	51	32	11.1	16.6	325.1	19.1
New York	416	178	11.4	17.1	297.6	17.5
New Jersey	82	46	3.3	4.9	71.5	4.2
California	73	32	2.6	3.9	56.9	3.3

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census
Current Industrial Reports
Industry Series MC82-I-22B; MC82-I-23B

PRODUCTION

U.S. production of women's sportswear/casual wear, in general, has continued to decline, even though the official U.S. Department of Commerce definition includes garments cut here but sewn abroad -- output of which has grown rapidly in recent years. In addition, production data, according to the International Ladies Garment Workers Union research department, are believed to include a growing amount of garments imported by domestic manufacturers, reported in error as domestic production. The ILGWU believes that U.S. output of women's wear is overstated for these reasons.

Sweaters have become a very important fashion item in the last couple of years, and pullover sweater production has been a noteworthy exception in the general decline. Production in 1985 was up 16% compared with 1984, and in the first four months of 1986, the Census Bureau reported shipments of women's sweaters by U.S. producers rose 55% compared with the same 1985 period.

PRODUCTION

Fleecewear, including sweat pants and warmups, also showed good results in 1985. Production of sweat pants rose 25% and warmups or jogging suits gained 10.1% compared with 1985. Now fleecewear has taken on a strong fashion significance and makers are rushing to step up production of both basic performance fleecewear and casual fleecewear with updated fashion looks and vibrant colors. These are expected to register strong results at Spring 1987 markets.

In the first four months of 1986, output of knit shirts gained 10%, and fashion trends continue to favor knits. Production of skirts in the same period gained 10.4%, according to preliminary Census Bureau counts. The sudden growth in popularity of denim should help the woven fabric sportswear/casual wear market, leading to new updated looks.

The longterm trend in production in U.S. plants has been compiled by the ILGWU, with figures benchmarked to the Census of Manufactures and including small plants (generally with fewer than five employees) which are not included in the Census Bureau's Current Industrial Reports. The general downtrend is expected to continue, despite possible restrictions in imports resulting from bilateral agreements on quota restrictions, as U.S. firms produce overseas and retailers increasingly source merchandise abroad for rapidly growing private label programs.

Unit Production of Specified Women's Sportswear/Casual Wear,
Selected Years, 1972-1984
(Millions of units)

	1984(p)	1982	1980	1979	1977	1974	1972
Women's, misses', juniors'							
Jackets (tailored & nontailored	37.4	45.4	33.4	26.4	27.0	28.6	20.5
Blouses	370.9	396.2	402.3	406.8	323.9	241.8	215.3
Knit sport shirts	131.7	161.6	161.2	162.5	154.3	100.4	86.3
Sweaters	94.3	86.0	77.8	78.2	95.3	85.9	79.7
Skirts	111.5	118.8	86.1	75.3	59.9	54.8	66.2
Pants	199.6	208.3	218.6	213.2	196.9	181.0	139.8
Jeans, dungarees	109.5	107.3	100.8	90.1	80.4	77.0	65.8
Playgarments	49.7	52.5	30.2	33.0	29.7	29.8	33.5
Swimwear	41.7	41.9	32.8	35.8	30.2	21.9	24.1

(p) preliminary

Note: ILGWU figures are benchmarked to the Census of Manufactures and include production by manufacturers with one or more paid employee.

Source: Research Department, International Ladies' Garment Workers' Union
Conditions in the Women's Garment Industry (Dec. 4, 1985)

PRODUCTION

A report issued by the Census Bureau in July 1986 includes the following data on unit production in 1985 compared with 1984 revised figures. The figures are developed through a mail survey of all known U.S. manufacturers and jobbers with the exception of very small plants (usually fewer than five employees). The Current Industrial Reports includes garments assembled abroad and shipped back to U.S. cutters under the terms of item 807 of the Tariff Schedule.

Summary of Production of Women's, Misses' & Juniors' Sportswear/Casual Wear: 1984, 1985
(Thousands of dozens, unless otherwise specified)

	1985	1984(r)	% Change 1985/84
Total, specified apparel (thous. doz.)	78,682	82,703	- 4.9%
Blouses & shirts	31,234	33,940	- 8.0
Woven	21,216	21,995	- 3.5
Knit	10,018	11,945	-16.1
Sweaters	7,562	6,609	+14.4
Pullovers	7,127	6,146	+16.0
Coat and cardigan	435	463	- 6.0
Separate tailored suit type jackets	24,022*	29,451*	-18.4
Nontailored outer jackets, excluding ski	2,688*	2,519*	+ 6.7
Vests, excl. sweater vests*	813*	1,323*	-38.5
Skirts*	93,577*	97,529*	- 4.1
Slacks, excl. dungarees & jeans	157,460*	163,200*	- 3.5
Jeans & dungarees*	84,982*	87,302*	- 2.7
Activewear:			
Sweat shirts	1,487	1,564	- 4.9
Sweat pants	961	769	+25.0
Warm-up or jogging suits	740	672	+10.1
Swimsuits	2,695	3,258	-17.3
Ski jackets, incl. ski vests	26	46	-43.5
Ski pants	10	12	-16.7
Team sport uniforms	326	488	-33.2
Body suits & body shirts	265	346	-23.4
Playwear:			
Shorts, including jogging & tennis	2,603	3,223	-19.2
Playsuits, beach tops, halters and other playgarments	477	518	- 7.9

(r) revised
* thousands of units
na not available

Source: U.S. Bureau of the Census
Current Industrial Reports
Women's & Children's Outerwear MA23F(85)

PRODUCTION

By Fabric/Construction

The percent distribution of 1984 and 1983 cuttings of women's sportswear by type of fabric and construction is covered in the following tables. However, this information is not always reported, although in 1985 an improvement in the level of reporting was noted.

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric, & By Construction, 1983 - 1985

	1985	1984	1983
Woven blouses & shirts	100.0%	100.0%	100.0%
By fabric:			
All cotton & chiefly cotton	26.1	23.4	20.7
All manmade & chiefly manmade	64.4	56.3	57.4
All wool & chiefly wool	0.2	0.2	0.4
All other fabric	4.3	4.7	5.3
Not specified	5.0	15.3	16.2
Knit blouses & shirts	100.0	100.0	100.0
By fabric:			
All cotton & chiefly cotton	25.8	29.4	26.9
All manmade & chiefly manmade	67.1	52.2	52.1
All wool & chiefly wool	2.2	2.2	2.0
All other fabric	1.4	2.1	0.6
Not specified	3.6	14.2	18.5
Pullover sweaters	100.0	100.0	100.0
By fabric:			
All cotton & chiefly cotton	52.3	30.4	24.2
All manmade & chiefly manmade	41.6	50.8	58.3
All wool & chiefly wool	2.3	3.3	5.0
Not specified	3.8	15.4	12.5
Coat and cardigan sweaters	100.0	100.0	100.0
By fabric:			
All cotton & chiefly cotton	8.7	3.3	2.1
All manmade & chiefly manmade	82.5	76.8	73.9
All wool & chiefly wool	4.6	4.2	6.6
Not specified	4.1	15.8	17.4
Separate tailored suit-type jackets	100.0	100.0	100.0
By construction:			
Woven	65.0	61.0	62.5
Knit	30.8	25.2	25.5
Not specified	4.2	13.7	12.0
By fabric:			
All cotton & chiefly cotton	9.1	7.5	9.8
Manmade/wool blends, chiefly manmade	6.3	7.9	58.7
All manmade & chiefly manmade, except manmade/wool blends	61.5	57.4	
All wool & chiefly wool	18.5	14.7	16.6
All other fabrics	2.1	1.1	1.1
Not specified	2.8	11.4	13.7

(continued)

PRODUCTION

By Fabric/Construction (continued)

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric & By Construction, 1983 - 1985

(continued)

	1985	1984	1983
Nontailored outer jackets, excluding ski	100.0%	100.0%	100.0%
By construction:			
Woven	85.8	50.1	45.8
Knit Not specified	14.2	49.9	54.2
By fabric:			
All cotton & chiefly cotton	5.5	7.2	7.5
All manmade & chiefly manmade	62.9	47.0	51.6
All wool & chiefly wool All other fabrics	17.4	6.8	6.9
Not specified	14.2	38.9	34.1
Vests, excluding sweater vests	100.0	100.0	100.0
By construction:			
Woven	49.6	30.7	30.4
Knit	28.5	51.0	55.8
Not specified	21.9	18.3	13.8
By fabric:			
All cotton & chiefly cotton	26.7	13.1	5.6
All manmade & chiefly manmade	38.3	23.3	57.9
All wool & chiefly wool	17.8	6.2	3.6
All other fabrics Not specified	17.2	55.3	40.7
Skirts	100.0	100.0	100.0
By construction:			
Woven	80.8	73.0	70.0
Knit	14.6	15.8	18.7
Not specified	4.6	11.3	11.4
By fabric:			
All cotton & chiefly cotton	20.4	17.8	17.0
Manmade/wool blends, chiefly manmade	5.7	3.0	57.3
All manmade & chiefly manmade, except manmade/wool blends	59.2	56.2	
All wool & chiefly wool	11.5	11.4	13.5
All other fabrics	1.8	1.3	1.5
Not specified	1.5	7.3	10.7

(continued)

PRODUCTION

By Fabric/Construction (continued)

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production
By Fabric & By Construction, 1983 - 1985
(continued)

	1985	1984	1983
Slacks, except dungarees and jeans	100.0%	100.0%	100.0%
By construction:			
Woven	74.5	65.5	63.4
Knit	20.3	23.9	26.5
Not specified	5.2	10.5	10.1
By fabric:			
All cotton & chiefly cotton	22.3	17.5	15.1
All manmade & chiefly manmade	68.0	68.4	70.8
All wool & chiefly wool	4.7	5.1	5.3
All other fabrics	1.0	0.6	0.7
Not specified	4.1	8.3	8.1
Jeans and dungarees	100.0	100.0	100.0
By fabric:			
All cotton & chiefly cotton	96.7	94.8	95.9
All manmade & chiefly manmade	2.7	4.1	2.9
Not specified	0.6	1.1	1.6
Swim suits	100.0	100.0	100.0
By construction:			
Woven	30.6	17.4	20.4
Knit	55.9	68.6	65.5
Not specified	13.5	14.0	14.1
Shorts, including jogging and tennis	100.0	100.0	100.0
By construction:			
Woven	77.9	69.3	65.9
Knit	15.1	10.7	15.2
Not specified	7.1		
By fabric:			
All cotton & chiefly cotton	36.7	27.4	27.0
All manmade & chiefly manmade	55.8	53.1	55.3
All other fabric Not specified	7.5	19.5	17.7
Playsuits, beach tops, halters and other playwear	100.0	100.0	100.0
By construction:			
Woven	20.1	28.9	29.9
Knit	70.4	53.3	52.2
Not specified	9.4	17.8	17.9
By fabric:			
All cotton & chiefly cotton	14.7	25.5	14.3
All manmade & chiefly manmade	59.7	55.4	51.3
All other fabric Not specified	25.6	31.5	34.4

(continued)

PRODUCTION

By Fabric/Construction (continued)

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric & By Construction, 1983 - 1985
(continued)

	1985	1984	1983
Washable service apparel, including uniforms, medical lab jackets, smocks, etc.	100.0%	100.0%	100.0%
By construction:			
Woven	75.2	72.2	64.7
Knit	21.8	17.1	22.0
Not specified	3.0	10.7	13.4
By fabric:			
All cotton & chiefly cotton	16.4	7.8	13.6
All manmade & chiefly manmade	80.4	78.8	74.2
All other fabric Not specified	3.2	13.4	12.2

Source: U.S. Bureau of the Census
Women's & Childrens' Outerwear MA23F(84)-1

The Seasonal Pattern in Production

The following table shows the 1985 distribution of production by months in specified types of women's, misses' & juniors' sportswear, based on the Census Bureau's monthly survey.

Monthly Distribution of Reported Cuttings of Selected Women's Sportswear, 1985

	Tailored Separate Jackets	Skirts	Slacks*	Blouses	Knit Outerwear Sport Shirts	Sweaters**
Total Year	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	9.3	9.2	8.3	8.2	8.2	5.8
February	8.2	8.8	8.2	8.4	8.5	7.0
March	8.3	8.5	9.1	9.0	8.3	6.4
April	8.5	8.2	8.1	8.3	8.0	6.2
May	7.9	8.4	8.8	8.6	8.8	6.8
June	7.8	7.7	8.9	8.3	10.0	7.6
July	7.8	8.0	7.8	8.0	7.9	9.7
August	9.9	8.3	8.6	8.5	8.3	9.7
September	8.4	8.1	8.1	8.3	7.9	8.8
October	8.5	9.6	8.9	9.5	8.9	12.9
November	8.4	7.7	8.3	8.7	7.1	9.8
December	6.9	7.3	6.9	6.1	8.0	9.3

* Includes jeans and dungarees, and jean-cut casual slacks
**Shipments

Source: U.S. Bureau of the Census, Current Industrial Reports
Men's, Women's, Misses' & Juniors' Selected Apparel
M231(86)-1.

PRODUCTION

Materials Consumed in Production

Materials Consumed By Industry Classification: 1977, 1982
(Delivered costs in millions of dollars)

Industry	1982	1977	% Change 1982/1977
Women's & misses' blouses (SIC 2331*), total	$1,236.9	$ 747.1	+ 65.6%
Broad woven fabrics	476.8	256.1	+ 86.2
Purchased knitted fabrics	257.9	217.4	+ 18.6
All other materials, components & supplies	107.8	79.9	+ 34.9
Unspecified materials, components & supplies	404.4	193.7	+108.8
Women's and misses' outerwear, n.e.c. (SIC 2339*), total	1,638.3	1,191.6	+ 37.4
Broadwoven fabrics	600.7	495.2	+ 21.3
Purchased knitted fabrics	211.0	251.3	- 16.0
All other materials, components & parts	144.6	137.9	+ 4.9
Unspecified materials, components & parts	682.0	307.2	+122.0
Knit Outerwear mills (SIC 2253*), total	1,047.9	887.9	+ 18.0
Purchased knitted fabrics	64.2	90.4	- 29.0
Carded cotton yarns	116.8	36.1	+223.5
Combed cotton yarns	44.2	29.7	+ 48.8
Rayon & acetate spun yarns	6.2	1.7	+264.7
Nylon spun yarns	5.0	8.7	- 42.5
Polyester spun yarns	81.3	34.0	+139.1
Acrylic yarns	138.6	128.0	+ 8.3
Wool yarns	39.9	24.3	+ 64.2
Rayon & acetate filament yarns	1.3	1.4	- 7.1
Nylon filament yarns	16.8	18.1	- 7.2
Polyester filament yarns	25.3	35.2	- 28.1
All other yarns	30.3	24.2	+ 25.2
All other materials, components & parts	229.1	201.2	+ 13.9
Unspecified materials, components & parts	248.9	254.9	- 2.4

*For a definition of SIC codes, see page 4. The above figures cover consumption of materials for all products made within the specified industries.

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census
1982 Census of Manufactures
Industry Series MC82-1-22B; MC82-1-23B

PRODUCT SHIPMENTS

In contrast with "industry shipments" which have been covered in the section on GENERAL INDUSTRY STATISTICS, and defined on page 4, product shipments cover the value of specific products made by all manufacturers with payroll, including those classified within the industry (primary producers) and those classified in other, unrelated industries (secondary producers).

As previously noted, U.S. manufacturing activity has been depressed due to competition from imported apparel made by foreign producers as well as through the growing practice of large U.S. manufacturers to produce apparel abroad or source finished garments abroad. In addition, U.S. exports have been hurt by the strong dollar, which made U.S. products too expensive for many overseas buyers.

However, domestic producers still maintain a competitive edge in producing coordinated sportswear and collections, and in supplying fast-changing merchandise where quick deliveries to retailers are essential -- particularly those manufacturers who have gained a reputation for quality. The fast-changes in fashions and fads in sportswear/casual wear also result in new, small producers coming in, and leaving the field.

The best performing product categories shipped by U.S. manufacturers last year were in fleecewear -- shipments of sweat pants for women, misses and juniors gained over 42% compared with their value in 1984; shipments of warmups and jogging suits were up almost 29%. Now the big fleece manufacturers are no longer relying on basic sweats, but are moving into fleece apparel with fashion colors and innovative styling -- items to be worn for leisure and street wear, not just for jogging. Large sizes are being offered. The market for fleece wear should show gains in 1986/1987.

Pullover sweaters have been a hot fashion item for the past two years. Imports have a large share of this market but U.S. producers managed to register the best gain (almost 5%) in value of shipments in 1985 reported for any sportswear/casual wear other than sweat pants and warmups/jogging suits. Sweaters of ramie and other vegetable fibers have made up a growing portion of sweater imports. These fibers were not subject to import controls until the revised Multi-Fiber Agreement was signed in August 1986, and domestic sweater mills hope the implementation of this through bilateral agreements will give them relief. (Importers, however, can switch to other blends or source in countries not covered by agreements.)

Manufacturers of trendy, contemporary sportswear/casual wear are doing best, and denim is the fashion-forward fabric, along with knits, for this market, allowing for fresh new looks in tops and bottoms which should do well this year and next.

The value of shipments reported in the Current Industrial Reports issued by the Census Bureau are developed through mail surveys among all known U.S. manufacturers and jobbers, except very small firms (usually with fewer than five employees). Apparel items assembled overseas, but cut in the U.S., which are then sent back to the U.S. producers under the terms of the 807 Tariff regulation are included in the CIR reports, but not apparel items that are produced entirely abroad.

Value of Shipments of Reported Women's, Misses' & Juniors' Sportswear/Casual Wear 1984, 1985
(Millions of dollars)

	1985	1984	% Change 1985/84
Sportswear/casual wear, total	$8,893.5	$9,489.8	- 6.3%
Tops:	4,253.2	4,519.8	- 5.9
Blouses & shirts, woven	2,089.6	2,158.5	- 3.2
Blouses & shirts, knit, exc. sweat shirts	765.9	874.2	- 12.4
Sweaters	611.9	591.7	+ 3.4
Pullovers	565.7	539.3	+ 4.9
Coat & cardigan	46.2	52.4	- 11.8
Separate tailored suit-type jackets	696.3	806.3	- 13.6
Nontailored outer jackets, except ski	76.6	73.1	+ 4.8
Vests, exc. sweater vests	12.9	16.0	- 19.4
Bottoms:	3,756.2	3,964.5	
Skirts	1,136.8	1,193.4	- 4.7
Slacks, exc. jeans & dungarees	1,629.0	1,575.0	+ 3.4
Jeans & dungarees	990.4	1,196.1	- 17.2
Active sportswear:	710.5	765.9	
Sweat shirts	90.9	91.7	- 0.9
Sweat pants	64.1	45.0	+ 42.4
Warm-up or jogging suits	94.5	73.5	+ 28.6
Swimsuits	381.3	442.4	- 13.8
Ski jackets, incl. vests	19.4	27.4	- 29.2
Ski pants	7.3	7.6	- 3.9
Team sports uniforms	21.3	35.1	- 39.3
Body suits and body shirts	31.7	43.2	- 26.6
Playgarments:	173.6	239.6	
Shorts, incl. jogging and tennis	142.3	201.4	- 29.3
Playsuits, beach tops, halters & other playwear	31.3	38.2	- 18.1

Source: U.S. Bureau of the Census
Current Industrial Reports
Women's and Children's Outerwear MA23F(85)-1

PRODUCT SHIPMENTS

Data from the complete census of manufactures covering the quantity and value of shipments by all U.S. producers with payroll in 1982 compared with 1977 is summarized below.

Quantity & Value of Shipments of Women's Sportswear/Casual Wear
Shipped By All U.S. Producers: 1977, 1982
(Quantity in thousands of dozens, value in millions of dollars)

	1982		1977	
	Quantity	Value	Quantity	Value
Women's, misses' & juniors'				
Knit sportshirts, incl. sweat	12,369	$ 805.4	na	na
Blouses, shirts	30,223	2,623.4	498	$25,492.0
Skirts	8,751	1,266.4	5,260	462.0
Pants, incl. jeans	23,662	2,644.0	20,280	1,530.6
Jackets, nontailored, excl. ski	293	106.3	376	66.8
Other sports outerwear (ski & snowsuits, etc.)	na	192.2	1,779	95.9
Vests, excl. sweater vests	204	24.4	na	na
Sweaters	5,891	480.3	na	na
Swimwear	3,139	411.5	na	na
Dungarees, shorts, bermudas, etc.	3,382	195.1	na	142.7
Playsuits, beach tops, halters, etc., excl. bottoms	595	36.3	494	26.9
Athletic uniforms	388	23.2	na	na

na not available

Source: U.S. Bureau of the Census
1982 Census of Manufactures

The ILGWU has compiled data on the long-term trend in the value of shipments by all U.S. producers, benchmarked to the Census of Manufactures. (Includes smaller manufacturers not covered in the Current Industrial Reports data on page 17.)

Value of Shipments By All U.S. Producers: Selected Years, 1972-1984
(Millions of dollars)

	1984	1983	1980	1979	1977	1974	1972
Women's, misses' juniors' sportswear/casual wear, total	$10,504	$11,003	$8,459	$7,364	$5,626	$4,058	$3,052
Jackets	991	1,146	727	504	328	296	168
Blouses, shirts	2,697	3,071	2,468	2,251	1,574	1,104	801
Knit sport shirts	830	858	710	676	608	383	304
Sweaters	698	612	480	466	507	393	336
Skirts	1,460	1,520	1,021	815	503	318	308
Pants	1,751	1,793	1,705	1,545	1,232	915	608
Jeans, dungarees	1,347	1,342	878	684	515	368	245
Playgarments	258	221	163	139	166	129	117
Swimwear	472	440	307	284	193	152	165

Source: Research Department, International Ladies' Garment Workers Union
Conditions in the Women's Garment Industry (Dec. 4, 1985)

PRODUCT SHIPMENTS

As noted in the previous sections on production and shipments, in recent years the industry has consolidated operations in order to meet competition from imports and in the face of declining markets abroad and in the U.S. in some classifications. (A weaker dollar, making U.S. product changes in many foreign markets, may help exports this year).

The latest figures on the share of specific product shipments accounted for by the largest companies are for the year 1982, compiled in the complete census of manufactures, and data for later years, if available, would probably show a greater degree of concentration among the larger companies. Because of the fast-changing fashions in tops, smaller manufacturers of blouses, shirts, etc., hold a bigger share of U.S. industry shipments than noted in other apparel categories.

Share of Specified Women's, Misses' & Juniors' Sportswear/Casual Wear Shipments By the Largest U.S. Manufacturers, 1982

	Product Shipments (Mil. $)	% of value accounted for by largest companies			
		Top 4	Top 8	Top 20	Top 50
Knit sport shirts*					
1982	$ 678.1	19%	32%	51%	72%
1977	499.1	19	29	48	76
Blouses, shirts					
1982	2,533.9	12	18	31	51
1977	1,421.7	14	21	35	56
Pants, incl. jeans					
1982	2,591.2	26	37	53	71
1977	1,460.1	21	29	45	69
Skirts, jackets					
1982	2,351.2	23	32	48	65
1977	738.3	21	29	43	64
Swim suits					
1982	387.1	33	52	84	99
1977	163.8	42	58	85	99

* Made in cut-and-sew shops using knitted fabrics. (Other knit shirts are made in knitting mills, and comparable data is not available.)

Source: U.S. Bureau of the Census
1982 Census of Manufactures
Concentration Ratios in Manufacturing (MC82-S-7)

Leading Manufacturers

The trade publication, SportStyle, compiles an annual list of the top companies in the activewear industry. Following are the top five manufacturers in specified activewear categories with sales figures for the year 1985. Sources are market estimates or statements by corporate officers. All figures include sales of men's and children's as well as women's products.

Leading Manufacturers (continued)

Leading U.S. Manufacturers of Specified Activewear, 1985
(including both men's and women's wear)
(Millions of dollars)

Tennis Apparel	1985 Sales
Jantzen	$ 30
Jockey	25
Catalina	18.5
Head sportswear	15
Fila	14.2

Golf Apparel	1985 Sales
Munsingwear	$ 31.9
La Monde du Golf	12.5
Jockey	10
Tall	8.5
Ultrasport	8.5

Active Sportswear	1985 Sales
Izod-Lacoste	$ 300
Jantzen	80
Catalina	60
Merona	55
Spalding	53

Athletic Footwear Apparel	1985 Sales
Nike	$ 172
Adidas	130
Puma	50
Pony	18
Converse	10.6

Warmups	1985 Sales
Tultex	$ 259.9
Bassett Walker	248
Pannill	191.5
Russell Knit Apparel	190
Stone Manufacturing	50

Running/Cycling/Triathalon Apparel	1985 Sales
Hind	$ 9.1
Dolfin	9.0
Sub 4	7.9
Bill Rodgers & Co.	7.4
Moss Brown & Co.	5.5

Rugged Outerwear	1985 Sales
Woolrich	$ 125
Pacific Trail	77
Patagonia	28
Jansport	20
The North Face	14

Hunting Apparel	1985 Sales
Walls	$ 18
Buddy Schoelkopf	16
Saf-T-Bak	10
Columbia Sportswear	9
Utica DuxBak	5.8

Ski Apparel	1985 Sales
CB Sports	$ 26.3
SportObermeyer	26
Roffe	21.5
White Stag	19
Head Sportswear	16

Beachwear	1985 Sales
Ocean Pacific	$ 237
Hobie Sportswear	45
Gotcha	30
Laguna	20
Catchit	13

Competitive Swimwear	1985 Sales
Speedo	$ 42
Arena	13.8
The Finals	6.5
Hind	3
Dolfin	1

Junior Sportswear	1985 Sales
Sassafras	$ 30.5
Ocean Pacific Jrs.	20
Catalina Jrs.	13.5
Daffy	8
Cole Jrs.	6

(continued)

Leading Manufacturers (continued)

Leading U.S. Manufacturers of Specified Activewear, 1985
(including both men's and women's wear)
(Millions of dollars)
(continued)

Team Apparel	1985 Sales
Russell Athletic	$ 127
Champion	118
DeLong	30.9
Bike	30.5
Mac Gregor - Sand knit	24

Bodywear	1984 Sales*
Danskin	$ 75
Capezio	50
Flexatard	20
Carushka	12
Tickets	9

* 1985 figures not available.

Source: SportStyle (Fairchild Publications), June 17, 1985; July 14, 1986

Leading States

Value of Shipments By All Producers of Specified Women's Sportswear/Casual Wear in Leading States, 1977, 1982
(Millions of dollars)

Women's, misses' & juniors'	1982	1977	% Change 1982/1977
Knit sport shirts, cut-and-sewn, U.S. total	$ 678.1	$ 502.1	+ 35.1%
Leading states:			
New York	221.0	139.1	+ 58.9
California	106.9	130.8	- 18.3
Florida	52.3	16.8	+211.3
Pennsylvania	41.8	60.1	- 30.4
New Jersey	41.4	31.4	+ 31.8
Blouses & shirts, U.S. total	2,533.9	1,403.5	+ 80.5
Leading states:			
New York	812.4	557.4	+ 45.7
California	725.4	259.1	+180.0
Pennsylvania	187.3	151.8	+ 23.4
North Carolina	140.9	58.8	+139.6
New Jersey	118.5	62.7	+ 89.0
Contract work on blouses & shirts, U.S. total	713.4	487.7	+ 46.3
Leading states:			
Pennsylvania	177.0	124.7	+ 41.9
California	86.5	50.2	+ 72.3
New York	64.2	61.7	+ 4.1
South Carolina	60.2	30.7	+ 96.1
North Carolina	43.4	23.7	+ 83.1

(continued)

PRODUCT SHIPMENTS

Leading States (continued)

Value of Shipments By All Producers of Specified Women's Sportswear/Casual Wear in Leading States, 1977, 1982

(Millions of dollars)
(continued)

	1982	1977	% Change 1982/1977
Women's, misses & juniors'			
Swimsuits, U.S. total	387.1	165.4	+134.0
Leading states:			
California	188.7	72.3	+161.0
New York	97.5	56.2	+ 73.5
Pants, U.S. total	2,591.2	1,465.4	+ 76.8
Leading states:			
New York	810.3	444.8	+ 82.2
California	346.4	237.8	+ 45.7
Texas	207.7	77.3	+168.7
Georgia	190.0	79.4	+139.3
North Carolina	129.0	100.7	+ 28.1
Outerwear, n.e.c., U.S. total	643.7	458.1	+ 40.5
Leading states:			
New York	180.9	145.9	+ 24.0
California	126.9	68.5	+ 85.3
New Jersey	32.5	22.3	+ 45.7
Texas	27.2	20.9	+ 30.1
Florida	25.1	12.5	+100.8
Contract work on outerwear, n.e.c., U.S. total	$ 780.9	$ 501.1	+ 55.8%
Leading states:			
New York	115.5	87.8	+ 31.5
Pennsylvania	93.3	55.9	+ 66.9
California	73.5	73.9	- 0.5
Texas	63.2	30.9	+104.5
Tennessee	59.5	29.6	+101.0
Made in Knitting Mills:			
Sweaters, knit jackets & jerseys, U.S. total	817.6	555.5	+ 47.1
Leading states:			
New York	255.2	220.6	+ 15.6
Pennsylvania	241.4	110.4	+118.7
North Carolina	86.5	32.3	+167.8
New Jersey	56.4	34.5	+ 63.5
Knit outerwear sport shirts, U.S. total	1,008.2	518.1	+ 94.5
Leading states:			
North Carolina	326.2	95.5	+241.5
Pennsylvania	103.3	93.1	+ 11.0
New York	55.0	49.1	+ 12.0

(continued)

PRODUCT SHIPMENTS

Leading States (continued)

Value of Shipments By All Producers of Specified Women's Sportswear/Casual Wear in Leading States, 1977, 1982
(Millions of dollars)
(continued)

	1982	1977	% Change 1982/1977
Other knit outerwear products, U.S. total	$ 856.6	$ 689.7	+ 24.2%
Leading states:			
Pennsylvania	262.8	na	--
North Carolina	182.8	81.6	+124.0
New York	71.3	132.2	- 46.1
Wisconsin	43.4	39.7	+ 9.3

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census
1982 Census of Manufactures
Industry Series MC82-1-22B; MC82-1-23B

PRODUCER PRICE INDEXES

The producer (factory) price for all women's apparel rose an average 1.6% between March 1985 and 1986 while the index for all commodities fell 2.7%. The largest increase in women's sportswear categories was in blouses and shirts which increased 9.5% over the period, while average producer prices for skirts recorded a decline of 4.7%.

Producer (Factory) Price Indexes for Selected Types of Women's Sportswear & Separates, December 1984, 1985, March 1985, 1986

	March			December		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/84
All commodities*	300.3	308.7	- 2.7%	310.2	309.8	- 0.1%
All apparel*	205.8	203.2	+ 1.2	205.1	201.8	+ 1.6
Women's apparel*	183.8	180.9	+ 1.6	183.3	179.6	+ 2.1
Skirts, including uniform (12/77=100)	120.3	126.2	- 4.7	129.6	126.2	+ 2.7
Slacks, jeans & dungarees (12/84=100)	100.0	99.3	+ 0.7	95.9	100.0	- 4.1
Blouses & shirts, except knit sport & sweat shirts (12/77=100)	166.4	151.9	+ 9.5	166.4	152.7	+ 9.0
Sweaters, jackets & jerseys (12/84=100)	96.1	96.0	+ 0.1	100.3	100.0	+ 0.3
Knit outerwear sport shirts, incl. sweatshirts (12/77=100)	151.2	na	--	151.2	na	--

*1967 = 100
na not available

Source: U.S. Department of Labor
Bureau of Labor Statistics

FOREIGN TRADE

Sportswear/casual wear, consist of many items, with designs that can be quickly copied or adapted for mass production in a variety of fabrics. They are prime targets for low-cost apparel producers abroad who want to get into the U.S. market either directly or by working with U.S. manufacturers and large retailers, particularly the mass merchandisers and big discount operations.

According to an analysis of total U.S. market supply of key sportswear/casual classifications, compiled by the U.S. Bureau of the Census, in 1984 imports (in terms of volume) represented 70% of total U.S. consumption of women's and children's sweaters, up from 64.4% in 1983. Of blouse and shirt consumption, imports accounted for 39% in 1984 compared with 33% a year earlier. The share held by imports in 1984 of total consumption of women's and children's slacks and shorts was 30% compared with 25.4% in 1983.

U.S. fabric producers and apparel manufacturers without their own large commitment to overseas production of finished apparel items, unsuccessfully waged a strong fight to get Congress to override President Reagan's veto of the Textile and Apparel Trade Enforcement Act in August 1986. However, the U.S. has participated in the five-year renewal of the Multi-Fiber Arrangements (M-FA). This has extended coverage, for the first time, to include apparel and fabrics made from vegetable fibers and blends of other fibers, as well as blends containing silk, and may affect exporters of sweaters made with ramie, shipments of which have mushroomed in recent years. In total, it is reported that 120 million sweaters made of vegetable fibers came into the U.S last year, and overall imports of apparel made with vegetable fibers accounted for 10% of American imports of apparel, up from 2% in 1984.

The M-FA sets the ground rules under which bilateral agreements can be negotiated. Some agreements have already been worked out with Hong Kong, Taiwan and South Korea, and U.S. interests can be expected to press for more controls, and possibly again try to get import quota legislation before the end of 1986. Meanwhile, it is hoped that a weaker U.S. dollar, which reduces the cost of American-made goods in the countries with an improved rate of exchange, will strengthen U.S. exports of apparel.

Imports

The sharp increase in imports of reported types of sportswear/separates is noted in the table below. Data include both women's and children's wear except where otherwise noted. (Figures cover apparel imported for use in the U.S. not items held for transhipment to other ports.)

FOREIGN TRADE

Imports

Imports of Selected Women's & Children's Wear, 1980-1984
(Thousands of units)

	1984	1983	1982	1981	1980
Blouses, total*	313,203	276,913	243,142	228,064	210,960
Cotton	164,373	140,055	125,985	118,007	107,475
Wool	10,060	7,166	5,186	7,968	6,603
Manmade	128,085	123,598	107,699	96,686	93,214
Silk (non-ornamented)	10,684	6,094	4,272	5,402	3,668
Knit shirts, not including knit tops, total	229,523	228,321	191,253	174,290	168,209
Sweaters (men's, women's, children's), total*	242,638	187,622	161,556	149,035	149,955
Cotton	15,189	10,000	8,900	5,651	6,115
Wool	42,063	34,392	31,055	27,519	30,659
Manmade	136,211	128,981	115,244	112,608	112,460
Skirts, total	45,392	36,443	23,334	21,559	14,774
Cotton	25,501	19,530	14,740	14,327	9,955
Wool	4,206	2,933	1,556	1,287	1,298
Manmade	15,685	13,980	7,038	5,944	3,522
Slacks & shorts, total*	149,269	140,596	99,845	106,626	97,843
Cotton	34,631	24,100	23,157	21,230	18,114
Manmade	112,308	97,166	107,224	75,482	68,585
Playsuits, total*	48,776	33,593	30,283	29,141	26,496
Cotton	34,631	24,100	23,157	21,230	18,114

* Includes garments of fibers not shown separately.

Source: ILGWU based on U.S. Bureau of the Census reports

The top five suppliers of imports of sportswear/casual wear in 1985 included Taiwan, Hong Kong, South Korea, China and the Philippines.

FOREIGN TRADE

Imports (continued)

Summary of U.S. Imports of Women's & Children's Sportswear & Separates, 1984, 1985

	Quantity (Thous. Doz.)		% change	Value C.I.F.* (Thous. Doz.)		% change
	1985	1984	1985/84	1985	1984	1985/84
Total, all reported categories	na	na	—	$4,826,723	$4,226,311	+ 14.2%
Blouses & shirts, total	39,639.8	37,391.3	+ 6.0%	1,978,402	1,777,464	+ 11.3
Blouses	22,173.7	17,928.8	+ 23.7	1,391,616	1,119,012	+ 24.4
Not knit	21,508.3	17,111.9	+ 25.7	1,321,505	1,036,488	+ 27.5
Cotton	11,312.8	9,597.5	+ 17.9	633,604	501,743	+ 26.3
Wool or manmade	9,387.3	6,769.9	+ 38.7	547,555	412,904	+ 32.6
Silk	808.2	744.5	+ 8.6	140,346	121,841	+ 15.2
Knit, wool	665.4	816.9	- 18.5	70,111	82,524	- 15.0
Shirts, knit						
Cotton or manmade	17,446.1	19,462.5	- 10.4	586,786	658,452	- 10.9
Sweaters, knit	13,221.2	11,372.4	+ 16.3	1,138,236	944,590	+ 20.5
Cashmere, wholly or part	61.0	70.9	- 14.0	29,106	29,758	- 2.2
Sheep-like hair	283.9	239.9	+ 18.3	40,502	37,015	+ 9.4
Wool	1,740.4	1,599.7	+ 8.8	267,508	222,137	+ 20.4
Manmade	9,842.5	8,571.7	+ 14.8	657,672	557,057	+ 18.1
Cotton	1,293.4	890.2	+ 45.3	143,448	98,623	+ 45.5
Pants, slacks & shorts	20,727.8	19,226.7	+ 7.8	1,265,557	1,139,779	+ 11.0
Not knit						
Cotton	12,597.3	12,263.2	+ 2.7	832,183	773,050	+ 7.6
Wool	373.4	241.2	+ 54.8	65,346	46,920	+ 39.3
Manmade	7,642.0	6,621.4	+ 15.4	346,394	302,091	+ 14.7
Silk	115.1	100.9	+ 14.1	21,634	17,718	+ 22.1
Skirts	4,177.4	3,784.0	+ 10.4	364,657	301,333	+ 21.0
Not knit	3,620.8	3,392.9	+ 6.7	318,702	267,902	+ 19.0
Wool	344.4	275.9	+ 24.8	66,393	52,209	+ 27.1
Manmade	1,192.4	1,105.3	+ 7.9	94,545	78,535	+ 20.4
Cotton	2,084.0	2,011.7	+ 3.6	157,764	137,158	+ 15.0
Knit	556.6	391.1	+ 42.3	45,955	33,431	+ 37.5
Wool	83.2	77.4	+ 7.5	17,195	13,916	+ 24.5
Cotton or manmade	473.4	313.7	+ 50.9	28,760	19,615	+ 46.6
Playsuits, not knit, cotton	2,486.1	1,985.7	+ 25.3	79,871	63,145	+ 26.2

na not applicable

* The C.I.F. value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census
U.S. General Imports, FT 135
December 1984, 1985

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

The market potential for women's sportswear has expanded not only due to the growth in population (particularly of young adults) but also to the rapid rise in the number of women in the labor force. This group requires more apparel than nonworking women and is the most open to new fashion approaches in color and style. As of April 1986, 51,172,000 women were in the labor force -- 55.1% of the noninstitutionalized female population (16 years and older). Of these 48,333,000 were employed. This compares with an average of 31,527,000 women employed in 1972.

Dress standards in the work place have become much more relaxed in recent years, and this has been a direct benefit to the sportswear/casual wear industry. Women rely on separates for variety and to update their workday and leisure wardrobes. The activewear category has been aided by the demographic characteristics of the population, with numbers concentrated in young adults interested in physical fitness and in sports participation.

Estimated Female Population of the U.S. 1985 & Projections 1995*, 2005*
(Numbers in thousands, including Armed Forces overseas)

				% Change	Percent Distribution		
	1985	1995	2005	2005/1985	1985	1995	2005
Total all ages	122,634	133,191	141,381	+ 15.3%	100.0%	100.0%	100.0%
Under 15 years	25,359	27,699	26,446	+ 4.3	20.6	20.8	18.7
15 years & older	97,274	105,493	114,935	+ 18.1	79.3	79.2	81.3
15 - 19 years	9,110	8,300	9,624	+ 5.6	7.4	6.2	6.8
20 - 24 years	10,503	8,420	9,382	- 10.7	8.6	6.3	6.0
25 - 34 years	21,059	20,077	17,324	- 17.7	17.2	15.1	12.2
35 - 44 years	16,136	21,119	20,341	+ 26.1	13.2	15.9	14.4
45 - 54 years	11,629	16,071	20,908	+ 79.8	9.5	12.1	14.8
55 - 64 years	11,834	11,059	15,399	+ 30.1	9.6	8.3	10.9
65 years & older	17,002	20,447	21,957	+ 29.1	13.8	15.4	15.5
Median age	32.7	35.9	39.2				

Source: U.S. Bureau of the Census
Current Population Reports,
P-25, No. 952 (May 1984), No. 985 (April 1986)

Activewear manufacturers are broadening their lines to cover fashion-active and street-active. They are also extending size classifications, particularly to include large sizes which previously had been ignored. Some retailers are reporting increases of 20% to 35% with this category. In a recent survey conducted by The Gallup Organization among large-sized women, sportswear was the most frequently cited category in which this group had trouble finding suitable styles and colors. The most common complaint about large sized sportswear among large sized women was a lack of styles as well as an insufficient variety of sizes.

RETAIL SALES

The large number of different items included in the broad category, women's sportswear/casual wear, and the great variety of retail outlets selling this merchandise -- from street vendors to specialty stores -- makes for difficulty in arriving at a total retail sales estimate. However, based on published information covering total market supply, the total value of retail sales is estimated at approximately $30 billion.

RETAIL SALES BY OUTLET TYPE

The U.S. Department of Commerce, Bureau of the Census, compiles a census of retail trade every five years, covering retail outlets with one or more employees. The most recent census covered operations in 1982, and reports on merchandise line sales by type of outlet were published by the Bureau in 1985.

Included in the reports are separate breakdowns on women's sportswear/casual wear for major outlet types, with the reported total amounting to about $20 billion for these outlets. Not included are sales in variety stores and other miscellaneous types of general merchandise stores, mail order sales (except catalog order desks in department stores), sales in menswear stores, supermarkets, by street vendors, etc., as well as sales by mama-papa operations without paid employees.

Following is a breakdown covering reported sales by outlet type in 1982. Women's wear stores accounted for 43% of the reported total sales of sportswear/casual wear; department stores, about 39%. Included in the $19.7 billion total in sales in covered retail outlets and tops, bottoms and activewear, as described below. Not included are jackets, blazers and other non-specified types of casual wear.

Sales of Specified Types of Women's Sportswear/Casual Wear
By Reporting Outlets, 1982
(Covers retail outlets with payroll. Sales in millions of dollars)

	Total Reported		Tops*		Bottoms**		Activewear	
	Sales	Percent	Sales	Percent	Sales	Percent	Sales	Percent
Sportswear/casual wear Reported sales:	$19,707.4	100.0	$9,198.7	100.0	$7,493.8	100.0	$3,014.9	100.0
Outlet types reported:								
Department stores#	7,633.5	38.7	3,510.7	38.2	2,911.2	38.8	1,211.6	40.2
Women's wear stores##	8,479.1	43.0	4,130.4	44.9	3,297.0	44.0	1,051.7	34.9
Family clothing stores	3,037.1	15.4	1,483.1	16.1	1,209.6	16.1	344.4	11.4
Sporting goods stores	393.5***	2.0	—	—	—	—	393.5***	13.1
Other reported types of retail outlets	164.2	0.9	74.5	0.8	76.0	1.0	13.7	0.4

# Department stores include discount department stores, the department store outlets of national chains such as Sears, Ward, Penney as well as traditional department stores. Leased sales are not included, but are counted in the Census as separate specialty store operations.

## Includes women's ready-to-wear stores and other specialized women's apparel/accessories stores.

* Includes both knit and woven shirts, blouses, sweaters.

** Includes pants, jeans, walking shorts, skirts.

*** Activewear (tennis, golf, jogging, swimming, etc.) in sporting goods stores includes girls' as well as women's.

Source: U.S. Bureau of the Census
1982 Census of Retail Trade RC82-1-3

RETAIL SALES BY OUTLET TYPE

Department Stores

Department stores accounted for 38.6% of the total sales of reported types of women's sportswear in retail outlets in 1982 according to the census of retail trade. Better than six out of every ten of the department stores reported sales of women's activewear, with sales in this category totaling $1.2 billion.

Women's Sportswear Sales in Department Stores: 1982

	Stores		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
Department stores, total	9,981	100.0	$99,170,163	—	100.0%
Sportswear/casual wear reported	na	na	7,633,474	na	7.7
Slacks, jeans, pants & skirts	6,073	60.8	2,911,185	3.8	2.9
Tops, incl. skirts, blouses & sweaters	6,105	61.2	3,510,668	4.6	3.5
Active sportswear	6,175	61.9	1,211,621	1.6	1.2

na not available

Note: Leased departments are not included in the above. Catalog mail order desk sales are included. Each store location is separately counted in the above table. Department stores include both traditional department stores and discount department stores which meet the definition of this store type under the Standard Industrial Classification (SIC) system. Department stores operated by mail order chains and mass merchandisers are also included in the above table.

Source: U.S. Bureau of the Census
1982, Census of Retail Trade (RC82-1-3)

Note: For details on department store operations, as reported in the 1982 Census, see the Fairchild Fact File: A STATISTICAL ANALYSIS OF RETAILING (1985).

The National Retail Merchants Association reported that adult female sportswear contributed a typical or median 14.8% of sales of their reporting department stores. Sales in 1984 averaged a gain of 10.8% with only women's & misses' active sportswear registering a larger gain (+13.9%).

RETAIL SALES BY STORE TYPE

Department Stores (continued)

Selected Typical (Median) 1984 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Total Upstairs Store (107)*	All Adult Female Apparel (103)*	All Adult Female Sportswear (105)*	Junior Spectator Sportswear (55)*	Junior Active Sportswear (31)*
Net sales % change from last year	+ 8.5%	+ 9.4%	+ 10.8%	+ 9.5%	+ 12.2%
Sales % to total store	93.9	28.7	14.8	3.1	0.6
Net sales % of merchandising division	—	100.0	55.7	12.1	2.4
$ sales per sq. foot of selling space	$127.0	$154.2	$164.6	$149.4	$183.4
Cumulative markon, %	49.0%	51.8%	51.9%	52.3%	52.5%
Gross margin, % of sales including cash discounts	41.2	42.1	42.6	44.2	44.0
Markdowns, retail, % of sales	18.8	28.2	27.5	26.3	27.7
Returns, % of sales	10.2	13.7	12.3	10.6	7.8
Number of stock turns	2.7	3.6	3.8	4.1	4.0
Salespeople's salaries, % of sales	7.6	6.5	6.5	4.3	5.0
Sales promotions % of sales	3.1	3.0	2.8	5.0	4.4

	Women's & Misses' Spectator Sportswear (64)*	Women's & Misses' Active Sportswear (39)*	All Adult Female Jackets & All-Weather Coats (47)*
Net sales % change from last year	10.7%	13.9%	+ 4.9%
Sales % to total store	11.4	1.1	0.9
Net sales % of merchandising division	45.8	4.4	3.6
$ sales per sq. foot of selling space	$146.4	$220.3	$165.6
Cumulative markon, %	52.4%	52.0%	51.0%
Gross margin, % of sales including cash discounts	41.9	44.7	44.1
Markdowns, retail, % of sales	29.5	25.9	22.4
Returns, % of sales	15.6	9.3	14.7
Number of stock turns	3.7	3.7	3.6
Salespeople's salaries, % of sales	5.3	7.0	6.1
Sales promotions % of sales	3.9	3.9	4.1

*Number in parentheses refers to the number of firms reporting in each category.

Source: National Retail Merchants Association
"Merchandising & Operating Results"
(1985 Edition)

RETAIL SALES BY STORE TYPE

Department Stores (continued)

In May 1986 a mail survey was conducted by the Fairchild Market Research Department for Women's Wear Daily among key department stores (as well as the important women's specialty stores) to develop information form merchandise managers on the merchandising of women's activewear.

All of the department stores represented in the survey carry fashion (or street) activewear, 73.4% of the respondents also carry authentic (functional) activewear. Where both types are sold, the typical department store does 80% of its business in fashion active, 20% in authentic active.

Warmups are the activewear item most frequently carried (and registering the fastest growth) by department stores, some of which classify them as fashion active. With the growing importance of updated fashion fleecewear, a growing number of department stores will follow this pattern. Dancewear/aerobic wear were the second most important items mentioned by department stores.

Most department store respondents (47%) reported that authentic activewear, when carried, is sold in the regular women's sportswear departments, both main store and branch store. About 28% said this merchandise is sold in separate functional active departments for adult females, while 17% sell it in a department that includes men's activewear. Just 8.5% reported that women's authentic activewear is sold in a separate sporting goods department.

Another survey, conducted by the Fairchild Market Research Deparment in August 1985, developed information on the merchandising of women's swimwear in department stores. Among the findings: maillots were the best-selling styles among reporting stores, accounting for a median 53% of swimwear sales in department stores, followed by sheaths (22%), bikinis (21%), swimdresses (12.2%).

Specialty Stores

According to the 1983 census of retail trade, sales of covered items of women's sportswear/casual wear in women's ready-to-wear stores with payroll amounted to $8.3 billion, representing almost 41% of total store sales. In family clothing stores, sales of covered items amounted to $3.0 billion, representing almost 23% of total store sales.

Women's Sportswear Sales in Specialty Stores, 1982

	Stores		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
Women's ready-to wear stores, total	44,163	100.0%	$20,248,922	—	100.0%
Sportswear/casual wear, total	na	na	8,282,375	na	40.9
Slacks, jeans, pants & skirts	37,649	85.3	3,283,800	18.9	16.2
Tops, incl. shirts, blouses & sweaters	37,668	85.3	4,111,671	23.2	20.3
Active sportswear	21,334	48.3	886,904	7.7	4.4

(continued)

Specialty Stores (continued)

Women's Sportswear Sales in Specialty Stores, 1982
(continued)

	Stores		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
Family clothing stores, total	17,859	100.0%	$13,451,003	—	100.0%
Sportswear/casual wear, total	na	na	3,037,144	na	22.6
Slacks, jeans, pants & skirts	14,760	82.6	1,209,644	11.3	9.0
Tops, incl. shirts, blouses & sweaters	15,353	86.0	1,483,063	12.4	11.0
Active sportswear	9,829	55.0	344,437	4.2	2.6

na not available

Note: Each store location is separately counted, regardless of whether or not it is part of a multi-unit operation.

For details on operations in these store types, as reported in the 1982 census, see the Fairchild Fact File: A STATISTICAL ANALYSIS OF RETAILING (1985).

Source: U.S. Bureau of the Census
1982 Census of Retail Trade (RC 82-1-3)

The National Retail Merchants Association reported that sales of women's and misses' sportswear registered median increases of 11.3% in women's wear stores in 1984, while junior sportswear averaged a gain of 1.7%.

Selected Typical (Median) 1984 Merchandising & Operating Results In Specialty Stores With Total Annual Sales Over $1 Million

	All Adult Female Apparel (28)*	Women's & Misses' Sportswear (26*)	Women's & Misses' Spectator Sportswear (09)*	Juniors' Sportswear (18*)
Net sales, % change from last year	+ 7.3%	+ 11.3%	nr	+ 1.7%
Sales, % of merchandise division	100.0	50.3	47.6	16.9
Sales, % to total store sales	48.9	22.5	13.6	7.0
$ sales per sq. foot of selling space	$144.0	$162.6	nr	$144.7
Cumulative markon, %	51.9%	52.3%	nr	51.8%
Gross margin, % of sales including cash discounts	42.9	43.1	nr	43.9
Markdowns, retail, % of sales	26.6	24.7	24.8	27.2
Returns, % of sales	10.0	10.3	nr	nr
Sales promotions, % of sales	2.5	2.2	nr	nr
Salespeoples salaries, % of sales	8.0	7.4	nr	nr
Number of stock turns	3.3	3.6	3.7	3.6

nr not reported
* Number in parenthesis refers to the number of firms responding in each area.

Source: National Retail Merchants Association
"Merchandising & Operating Results" (1985 Edition)

RETAIL SALES BY STORE TYPE

Sporting Goods Stores

Sporting Goods Store Sales By Merchandise Line, 1982
(Includes establishments with payroll, including leased departments)

	Stores		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
General line sporting goods stores sales, total	9,252	100.0%	$4,377,471	—	100.0%
Women's & girls' activewear	6,236	67.4	282,514	9.2	6.5
Specialty line sporting goods stores, total	10,900	100.0	3,137,440	—	100.0
Women's & girls' activewear	2,177	22.0	110,938	15.0	3.5

Source: U.S. Bureau of the Census
1982 Census of Retail Trade RC82-1-3

RETAIL SALES BY PRODUCT

Activewear and sweaters were the two bright areas in the sportswear markets, both marking double digit gains in unit purchases in 1985 according to an analysis by Kurt Salmon Associates. Overall, however, retail sales for women's sportswear remained weak in 1985. For 1986, the same pattern of generally flat sales was expected, with the exception of sweaters and activewear. Trade sources cite the lack of newness in the category for the lack of sales growth in recent seasons.

Percent Change in Women's Sportswear Consumption, 1983 - 1986
(% change in units purchased by Consumers)

	Forecast 1986/1985	Estimated 1985/1984	1984/1983	1983/1982
Women's wear, total	+ 3%	--	+ 1%	--
Blouses & shirts	- 2	- 5%	- 2	- 2
Sweaters	+ 10	+ 20	+ 11	+ 6
Slacks	+ 3	+ 3	- 1	+ 9
Denim Jeans	+ 2	+ 1	- 7	--
Skirts	+ 2	- 11	+ 2	+ 4
Activewear	+ 8	+ 15	+ 16	+ 32

Source: Kurt Salmon Associates
Softgoods Outlook, 1986
Based on the KSA/NPD purchase panel of 18,000 households.

RETAIL SALES BY PRODUCT

Sweaters

According to an analysis of consumer purchases, issued April 1986 by the Soft Goods Information Service Group of MRCA Information Services, Stamford, Conn., sweaters have been one of the brighter areas within the women's sportswear industry. Between 1980 and 1985, women's sweater purchases jumped from 189 million to 329 million yearly -- or from just over two sweaters per woman, to well over three per capita. This market, in dollar terms, grew by over $1 billion in 1985 reaching $5.6 billion in sales that year. The MRCA data are based on purchase diaries maintained by a representative panel of households in the U.S.

Two of the keys which are believed to have spurred sweater sales in recent years are affordability and versatility. According to a study of the market by a major market research company, the average price of sweaters purchased in 1985 was about $20. At this level, sweater purchases can be made without much deliberation. Sweaters are also extremely versatile in that they can be used to create several different outfits which often can bridge the gap between work and leisure.

Retailers are currently taking steps to springboard the growth which has occurred in the sweater category into other areas. In light of the sales ratio of 2-to-1 for bottoms to tops, many retailers are merchandising skirts along with sweaters in order to stimulate sales in that category.

Women's Jeans

The $3.0 billion women's jeans market has been stagnant over the last several years. As 1986 progresses, however, retailers are reporting a resurgence of the basic, five-pocket jean, particularly in black and gray denim. While sales are expected to show a slight improvement in 1986, they are still well below the peak levels recorded in 1983. One of the major reasons credited for the decline of the jeans market is the aging of the baby boomers, the segment which drove jeans sales up in the 1970's. Market estimates are for 172.1 million pairs of women's jeans to be purchased in 1986.

Manufacturers and retailers have responded to this change in the market by altering their merchandise mixes. Without cutting back on their denim groupings, many firms are now offering a wider variety of pastels and prints. Streamlined silhouettes are expected to aid jean sales as are cigarette-leg pants.

With the impending merger of VF Corporation and Blue Bell Holding Co., the structure of the jeans industry is about to undergo a major change. This newly formed company is expected to garner the largest share of the jeans market, dropping Levi Strauss into second position domestically. Levi's, however, will remain the largest jeans company worldwide. Pre-merger, market share is shown in the table below.

U.S. Jeans Market Share By Brand, 1985
(Includes both men's and women's)

	Market Share
Levi Strauss	22%
Lee (VF Corp.)	15
Wrangler (Blue Bell)	10
Imports	20
All other U.S. brands	33

Source: Wall Street Journal
July 31, 1986

RETAIL SALES BY PRODUCT

Activewear

Market estimates on sales of women's activewear, which includes "fashion" active as well as performing or functional activewear, put the category at about $3.3 billion in 1985, 10% above the $3.0 billion reported for 1982 in the Census of Retail Trade, U.S. Census Bureau. According to data from Kurt Salmon Associates, activewear for women has been one of the best performing apparel categories, on a unit sales basis, since 1982. For 1986, this source estimates that women's unit sales will increase by about 8%.

Annual Change in Female Activewear Consumption, 1982 - 1986
(Percent change in units purchased)

	1986/1985(p)	1985/1984(e)	1984/1983	1983/1982
Women's activewear	+ 8%	+ 15%	+ 16%	+ 32%

(p) preliminary (e) estimated

Source: Kurt Salmon Associates
Softgoods Outlook, 1986
Based on the KSA/NPD Purchase Panel of 18,000 households

The rapid growth in the number of women in sports participation has had a major effect on the entire sporting goods industry including sales of activewear. While men still represent the largest number of active participants in most sports, the NSGA reports that a large majority of new participants in many sports are women.

Following is a list of the top ten sports based on participation by women as determined by a survey of adults 18 years and over by the Gallup Organization in late 1985.

Female Participation in Specified Sports, 1985
(Percent participating in the past twelve months)

Sport	Percent
Swimming	40%
Bicycling	33
Aerobics	31
Fishing	24
Bowling	23
Camping	21
Jogging	21
Hiking	18
Softball	16
Volleyball	14

Source: The Gallup Organization

RETAIL SALES BY PRODUCT

Activewear (continued)

Functional activewear sales estimates for 1984-1986, based on interviews with 80,000 households, have been compiled by the National Sporting Goods Association. It should be noted that these estimates do not include institutional (team) purchases.

Estimated Retail Sales of Specified Women's Functional Activewear, 1984-1986
(Millions of dollars)

	Forecast For 1986	Estimated 1985	Estimated 1984	1986/1985
Total	$1,210.0	$1,168.0	$1,137.7	+ 3.6%
Swimwear	569.1	552.8	560.5	+ 2.9
Golf clothing	54.2	52.6	53.1	+ 3.0
Parkas - down/fiber filled	95.0	93.1	93.1	+ 2.0
Shorts - elastic waist	83.6	83.6	83.6	--
Skiwear	141.7	130.6	97.6	+ 8.5
Sweatshirts	160.2	152.6	145.3	+ 5.0
Tennis clothing	58.8	55.7	54.6	+ 5.6
Vests - down/fiber filled	47.4	47.4	49.9	--
Warm-up suits				

Source: Fairchild Market Research Department based on
National Sporting Goods Association
The Sporting Goods Market in 1986

RETAIL ADVERTISING

Percent of Year's Total Newspaper Linage Run By Retailers Each Month, 1984

	Junior Sportswear	Sweaters & Knit Tops	Swimsuits & Beachwear	Woven Blouses & Shirts	Pants, Shorts & Jeans
January	3.5%	3.9%	5.3%	4.9%	4.6%
February	6.6	5.6	5.7	9.3	7.2
March	7.0	7.0	4.1	8.8	9.3
April	8.8	8.1	6.2	9.5	10.2
May	9.5	7.8	19.3	9.5	10.0
June	5.6	5.3	30.8	4.5	6.8
July	7.6	5.9	12.9	5.7	7.9
August	17.7	8.9	1.4	8.2	10.5
September	7.7	8.9	0.2	8.2	8.7
October	7.6	10.7	0.0	9.2	9.1
November	10.4	14.2	6.4	11.7	8.1
December	8.0	13.7	7.7	10.5	7.6
Year	100.0	100.0	100.0	100.0	100.0

Source: The Advertising Checking Bureau, Inc.
Newspaper Advertising Bureau
(1986 Newspaper Advertising Planbook)

CONSUMER PRICE TRENDS

Retail prices for women's apparel fell 1.5% in the twelve months ended in May 1986 compared with a 1.6% increase for the overall Consumer Price Index over the same period. Women's separates and sportswear prices increased 4.0% during this period.

Consumer Price Indexes for Selected Women's Apparel Items
1984, 1985 Average, May 1985, 1986
(1967 = 100 unless otherwise specified)

	May			Annual Average		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/83
All items	326.3	321.3	+ 1.6%	318.5	307.6	+ 3.5%
Apparel (not including footwear)	187.3	187.3	--	187.7	182.5	+ 2.8
Women's apparel (1977=100)	110.6	112.3	- 1.5	114.6	110.3	+ 3.9
Separates & sportswear (1977=100)	106.0	101.9	+ 4.0	104.4	96.2	+ 8.5

Source: U.S. Department of Labor,
Bureau of Labor Statistics

CONSUMER BUYING HABITS

Information on the demographic characteristics of purchasers of activewear is compiled by the National Sporting Goods Association. This data covers both male and female purchasers (combined); however, a majority of items covered in the table below are represented by female purchasers.

Characteristics of Specified Activewear Purchasers, 1985

	Total U.S. Households	Bathing Suits	Body Suits
Total, all purchases	100.0%	100.0%	100.0%
Sex of user:			
Female	51.3	79.6	94.9
Male	48.7	20.4	5.1
Age:			
Under 14	20.3	9.4	10.8
14 - 17	6.2	9.6	5.5
18 - 24	12.4	14.2	13.6
25 - 34	17.4	30.1	40.8
35 - 44	13.0	16.7	19.3
45 - 64	18.9	16.3	9.1
65 & older	11.8	3.7	0.9

(continued)

Characteristics of Specified Activewear Purchasers, 1985
(continued)

	Total U.S. Households	Bathing Suits	Body Suits
Household income:			
Under $15,000	31.9	16.8	17.9
$15,000 - $24,999	20.7	16.9	20.6
$25,000 - $34,999	17.8	19.7	20.3
$35,000 - $44,999	12.1	15.2	12.7
$45,000 & over	17.5	31.4	28.5
Geographic region:			
New England	5.4	5.2	3.7
Middle Atlantic	15.9	18.3	11.1
East North Central	17.5	14.7	18.0
West North Central	7.5	5.7	4.0
South Atlantic	17.0	18.6	19.6
East South Central	6.4	5.2	4.9
West South Central	10.8	11.8	10.2
Mountain	5.4	4.8	7.9
Pacific	14.1	15.7	20.6

Source: National Sporting Goods Association
The Sporting Goods Market in 1986

Average Purchase Rates of Women's Sportswear, 1984
(Monthly purchase rate per 1,000 households)

	Jan.	Feb.	Mar.	Apr.	May	June
Blouses/sweaters	834.9	742.8	935.9	842.6	1005.3	1189.6
Pants/slacks/shorts	227.6	217.9	312.8	337.1	435.7	539.7
Jeans	99.9	86.6	125.7	87.2	98.7	79.8
Skirts/suits/dresses	305.8	355.6	461.0	492.7	511.1	548.0

	July	Aug.	Sept.	Oct.	Nov.	Dec.
Blouses/sweaters	997.9	874.7	955.5	870.0	982.7	1652.0
Pants/slacks/shorts	418.9	298.0	256.3	222.3	214.8	265.1
Jeans	77.6	144.1	111.1	96.3	89.0	146.1
Skirts/suits/dresses	432.2	392.4	367.5	340.6	287.2	412.1

Source: MRCA Information Services, 1984
1986 Newspaper Advertising Planbook
Newspaper Advertising Bureau

CONSUMER BUYING HABITS

Women's Sportswear Purchases By Price Point, 1984

	Skirts	Slacks	Sweaters	Knitted Tops	Woven Blouses	Shorts	Warmups
Under $5	6.5%	6.4%	3.8%	22.8%	10.2%	27.0%	3.2%
$ 5 - $ 9.99	22.2	28.8	24.2	43.2	34.8	42.8	10.5
$10 - $14.99	24.6	25.3	25.1	19.2	25.9	18.0	19.9
$15 - $24.99	28.3	28.9	30.3	12.0	21.1	10.6	39.2
$25 - $34.99	10.3	6.6	10.8	2.2	5.4	1.2	15.7
$35 - $49.99	2.4	1.1	1.8	0.2	0.8	0.1	3.5
$50 & over	5.7	2.4	4.0	0.4	1.8	0.3	8.1

Source: MRCA Information Services, 1984
1986 Newspaper Advertising Planbook
Newspaper Advertising Bureau

SEVENTEEN Magazine's annual Back-To-School study, conducted most recently in September 1984, detailed what teen girls spent on their wardrobe. Completed questionnaires were received from 1,125 teenagers currently attending high school or college. Results were then projected to the entire market.

Teenage Buying Trends for Sportswear & Separates

	Number Purchasing Add (000)	Number Purchased Add (000)	Total Expenditures Add (000)
Jackets			
Blazers	1,274	1,736	$ 62,293
Ski jackets	1,104	1,234	79,617
Leather/Suede	261	273	27,617
Bomber	647	665	29,748
Parkas	304	388	17,126
Pea coats	202	219	16,471
Blouson	633	664	25,390
Other	959	1,079	47,905
Total buying jackets	4,312	6,368	318,818
Skirts			
Below knee length	2,376	3,503	115,069
Knee length	1,795	2,906	71,036
Mini (above the knee)	1,497	1,928	38,988
Other	96	124	4,243
Total girls buying skirts	4,633	8,461	229,336
Total girls buying shirts/ blouses	5,010	20,550	502,550

(continued)

Teenage Buying Trends for Sportswear & Separates
(continued)

	Number Purchasing Add (000)	Number Purchased Add (000)	Total Expenditures Add (000)
Sweaters			
Pullovers	6,069	16,187	$ 487,983
Turtlenecks	1,508	3,397	43,664
Cardigans (cardigan vest)	1,660	2,378	67,248
Coat sweaters	381	475	17,474
Sweater jackets	634	735	26,161
Pullover vests	4,372	7,685	201,987
Other	225	358	21,213
Total girls buying sweaters	7,421	31,215	865,730
Pants			
Jeans	6,660	14,321	504,970
Long, straight leg	3,261	6,211	185,408
Narrow-leg	4,013	7,448	233,983
Shorts	2,326	6,221	121,613
Cuffed pants	1,752	2,535	76,029
Ski	218	255	15,410
Wide-leg	678	1,160	39,643
Baggies	208	285	8,581
Other	837	1,566	43,429
Total girls buying pants	8,178	40,002	1,229,066

Women's Swimwear

Information on the purchase patterns for women's swimsuits is available from a survey of 1,500 women conducted by The Gallup Organization. According to this study, nearly two out of three women report buying their swimsuits on sale, and are most apt to buy swimsuits in early summer.

Price Expected to Pay for Next Swimsuit Purchase

	Age of Purchaser						Income of Purchaser (thous.)			
Price Paid	Total	18-24	25-34	35-49	50-64	65+	Under $20	$20 $30	$30- $40	$40+
Less than $20	24%	36%	25%	20%	21%	8%	33%	24%	18%	9%
$20 - $29.99	38	38	46	40	31	32	37	43	48	38
$30 - $39.99	22	15	19	23	23	31	13	25	22	29
$40 or more	12	11	8	13	17	11	9	8	10	23
Don't know/ No answer	5	--	3	6	6	19	8	2	5	1

CONSUMER BUYING HABITS

Women's Swimwear (continued)

Stores Shopped for Last Swimsuit

	Age of Purchaser						Income of Purchaser (thous.)			
	Total	18-24	25-34	35-49	50-64	65+	Under $20	$20-$30	$30-$40	40+
Department stores	64%	55%	77%	59%	61%	57%	56%	56%	71%	82%
Mass merchandisers (Sears, Penney, Ward)	14	13	10	16	16	12	16	16	9	3
Specialty stores	11	18	11	6	13	12	10	12	11	11
Discount stores	10	7	8	17	8	4	13	13	16	3
All other stores	12	20	9	10	9	8	10	20	13	9
Don't know/no answer	2	2	—	1	—	12	4	—	2	—

Note: Columns add to more than 100.0% due to multiple responses.

Number of Swimsuits Purchased In Year

	Age of Purchaser						Region			
	Total	18-24	25-34	35-49	50-64	65+	East	Midwest	South	West
One	58%	54%	67%	59%	52%	52%	62%	52%	65%	51%
Two	12	30	10	8	5	4	13	8	12	14
Three or more	5	7	5	4	—	—	4	2	7	3
None	22	8	17	22	39	33	18	34	11	26
Don't know/no answer	4	2	1	7	4	12	3	4	4	7

Source: The Gallup Organization
Apparel Merchandising, September 1985

Jeans

Results from another survey conducted by The Gallup Organization covering purchases of jeans indicated that slightly more than half of all purchasers expect to pay less than $25. Overall, Gallup estimates that 172.1 million pairs of jeans will be sold in 1986 with the most common purchaser being between 18 and 34 years old.

Expected Price of Next Women's Jean Purchase

	Age of Purchaser						Income of Purchaser (thous. $)		
	Total	18-24	25-34	35-49	50-64	65+	Under $20	$15-$30	$30+
Price Expected to Pay									
Less than $20	28%	29%	27%	14%	34%	46%	35%	31%	20%
$20 - $29.99	29	29	29	36	20	9	29	31	29
$30 - $39.99	16	16	19	13	11	18	16	16	14
$40 or more	20	23	24	15	15	27	11	17	30
Don't know/ No answer	7	3	1	12	20	--	9	5	7

Jeans (continued)

Stores Expected to be Shopped For Next Jeans Purchase

	Age of Purchaser						Income (thous. $)		
	Total	18-24	25-34	35-49	50-64	65+	Under $20	$15-$30	$30+
Department stores	44%	44%	47%	43%	37%	36%	44%	45%	49%
Discount stores	20	25	19	21	14	9	24	17	13
Specialty stores	15	24	16	11	11	9	10	13	21
Mass merchandisers (Sears, Penney, Ward)	12	3	12	8	27	45	9	13	10
All other	8	4	10	13	5	—	8	8	7
Don't know/no answer	6	—	2	8	18	—	8	5	4

Number of Jeans Expected to be Purchased in the Next Year

		Age Groups				
	Total	18-24	25-34	35-49	50-64	65+
One	10%	13%	18%	10%	8%	2%
Two	15	23	15	29	4	4
Three or more	27	53	47	21	17	2
None	44	11	17	33	61	92
Don't know/no answer	4	--	3	7	10	--

Source: The Gallup Organization
Apparel Merchandising, March 1986

Blouses

Still another survey by The Gallup Organization, published in the January 1986 issue of Apparel Merchandising, indicates that department stores were the principal store type shopped by blouse purchasers.

CONSUMER BUYING HABITS

Blouses (continued)

Stores Types Usually Shopped For Women's Blouses

		Age Groups					Income (thous. $)		
	Total	18-24	25-34	35-49	50-64	65+	Under $15	$15-$30	$30+
Department stores	47%	48%	56%	45%	41%	42%	40%	51%	60%
Discount stores	22	21	21	23	24	23	30	21	11
Specialty stores									
Mass merchandisers	21	27	19	23	21	13	16	20	24
(Sears, Penney, Ward)	20	13	22	11	29	26	29	21	12
All other stores	7	4	7	13	7	2	4	6	15
Don't know/no answer	4	2	—	4	3	11	1	3	3

Price Usually Paid for Women's Blouses

		Age Groups					Income (thous. $)		
	Total	18-24	25-34	35-49	50-64	65+	Under $15	$15-$30	$30+
Less than $15	28%	28%	31%	24%	29%	30%	45%	27%	11%
$15 - $24.99	40	44	41	35	43	35	37	49	36
$25 - $29.99	10	12	7	16	8	8	4	9	18
$30 or more	16	11	17	19	18	11	11	12	29
Don't know/no answer	7	5	4	7	4	18	5	4	6

Style of Blouses Expected to Buy in the Next Year

		Age Groups					Income (thous. $)		
	Total	18-24	25-34	35-49	50-64	65+	Under $15	$15-$30	$30+
Tailored shirt	34%	35%	44%	35%	35%	17%	37%	38%	40%
Tailored blouse	29	23	26	37	33	24	31	28	35
Soft blouse	28	24	37	31	31	14	20	32	42
Dressy blouse	25	30	32	23	25	13	18	30	28
Big shirt	29	54	37	31	16	6	23	29	36
None	13	6	5	8	12	40	20	8	5
Don't know/no answer									

Source: The Gallup Organization
Apparel Merchandising, January 1986

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now -- 1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE: Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well as information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

The price of Fairchild Fact Files is $15.00. Prices are subject to change. For orders and further information, please write to:

FAIRCHILD FACT FILES,
Fairchild Books,
7 East 12th Street, New York, N.Y. 10003